

SECTION TWO

PLANNING

THE CAMPAIGN



2	PLANNING		A.MARKET RESEARCH	
			1.OVERVIEW	
	SUN	MON	Market research is needed before and during HOV projects to define the social and political atmosphere, identify stakeholders, document travel behavior, test marketing concepts, and measure the attitudes and awareness of various target groups.	

A variety of market research activities are needed throughout the planning and implementation stages of an HOV project. Early in the planning stages, market research can help to define the social and political atmosphere in which the project will be set, identify key stakeholding groups, and assemble information on other HOV projects with similar goals, objectives, or design characteristics. As the planning progresses, surveys and group discussions can be used to identify public concerns and expectations, test marketing concepts, and document the attitudes and awareness of various target groups. Opinion surveys taken during the project planning stages will provide baseline comparisons for ongoing evaluations once the HOV lanes are operating.

Several research tools are available for developing market information. The tools most used in planning and evaluating HOV lanes are listed below and summarized in the accompanying exhibit.

- **Focus Groups.** A focus group discussion is a flexible research technique used to gather qualitative or exploratory information regarding individual perceptions of an idea or product. Small groups (usually eight to twelve people) freely discuss a set of predetermined topics under the guidance of a trained moderator. Focus groups are useful for sampling driver opinion and attitudes regarding HOV lanes, testing marketing concepts and exploring public concerns and expectatoins in some depth.
- **Telephone Surveys.** Telephone surveys are accomplished by trained interviewers following a predetermined script with a statistically sampled population of residents or drivers. Telephone surveys can be used to gather travel information and data, measure public opinions and attitudes, document awareness regarding HOV projects and marketing campaigns; record mode shifts; and track project acceptance over time.
- **Mail-Back Driver Surveys.** Short questionnaires are either distributed to drivers at sampling stations such as freeway on-ramps or mailed to the registered owners of vehicles whose license plates were recorded using the project corridor. Mail-back surveys can be used to document attitudes, develop origin/destination data, and document mode and route shifts.
- **On-Board Surveys.** Questionnaires are distributed to transit riders as they board the vehicle and either collected when they leave or returned by mail. These surveys serve the same purpose for transit riders that mail-back surveys do for corridor drivers.
- **Executive Interviews.** Face-to-face interviews with opinion leaders and decision makers are conducted to gauge the perceptions of key groups regarding HOV projects and identify institutional issues. These interviews, which last approximately one hour, are also useful for establishing liaisons with business and political leaders as part of the constituency building process.

The accompanying exhibit lists the primary advantages and disadvantages of each of these approaches and provides some order-of-magnitude information on cost ranges and likely survey response rates. Each of these market research tools has its particular uses, and all can be employed to advantage in marketing and evaluating a particular HOV project. Subsequent subsections discuss these tools in more detail.

2	PLANNING		A. MARKET RESEARCH	
			2. PRELIMINARY RESEARCH	
	SUN	MON	Preliminary market research activities include library work, informal conversations, examinations of related campaigns, and a review of similar projects.	
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"If you steal from one author, it's plagiarism; if you steal from many, it's research."

Wilson Mizner

This handbook is designed to help individual practitioners start their own market research activities by reviewing relevant literature, contacting experts in the field, examining related campaign materials, and studying similar HOV projects throughout the U.S.

Literature Review. A thorough literature search should be the first market research activity undertaken on any project. The bibliography of Appendix E contains references to reports on relevant HOV marketing activities, as well as selected HOV project evaluations and studies of a variety of HOV issues. In addition to formal reports, local news clippings, transportation plans, clean air ordinances, speeches, and voting records should also be reviewed.

Expert Advice. Conversations with individuals experienced in HOV planning and marketing may help to clarify specific concerns. Appendix E contains the names of several such individuals, including marketing consultants with HOV experience, planners in charge of overseeing HOV projects, and public information specialists responsible for marketing HOV lanes at the state and local levels.

Related Campaign Materials. Sample materials from past and ongoing ridesharing campaigns and HOV marketing efforts are used as illustrations throughout this manual. (The accompanying exhibit shows a ridesharing poster that preceded HOV marketing efforts in the U.S.) Appendix B contains additional examples of marketing materials, while Appendix D presents sample survey forms and formats for executive interviews and focus group discussions.

Project Data. Appendix C contains data describing current HOV projects in North America, as assembled by the Transportation Research Board's Committee on HOV Lanes.

A. MARKET RESEARCH		PLANNING									
2. PRELIMINARY RESEARCH											
EXHIBIT: CLASSIC RIDESHARING POSTER TO ENCOURAGE FUEL SAVINGS DURING WORLD WAR II		2 <table><tr><td>SUN</td><td>MON</td></tr><tr><td></td><td>1</td></tr><tr><td>7</td><td>8</td></tr><tr><td>14</td><td>15</td></tr></table>		SUN	MON		1	7	8	14	15
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Source: Smithsonian Collection/1942 Weimer Pursell											

<div>2</div>	PLANNING		A. MARKET RESEARCH	
			3. FOCUS GROUPS	
	SUN	MON	<p>Focus group discussions can provide rich in-depth insights into public concerns regarding design issues, highlight driver attitudes and convictions, and flag promising and unpromising marketing approaches.</p>	

A focus group discussion is a flexible research technique used to gather rich, in-depth data in a relatively unstructured manner. Discussion groups of eight to twelve people are allowed to interact freely on a set of predetermined topics under the direction of a trained group leader. The resulting interpersonal interactions can be quite informative, particularly when the topics address issues, such as HOV lane operation, which inherently contain a high degree of public interest.

Because focus groups are relatively small, they are not designed to provide precise statistical quantification of the issues under discussion. Rather, they are designed to explore key issues in greater depth and highlight related attitudes and convictions. In-depth insights are obtained at the expense of the precise quantification available through the larger sample sizes of survey research. The insights obtained through focus group discussions can, however, be applied in the development of formal surveys designed to permit more precise statistical quantification of key issues.

Uses. In marketing HOV lanes, focus groups can be used effectively to pre-test marketing materials, probe awareness of past campaigns, sample driver opinions and attitudes regarding HOV lanes, and explore public concerns and convictions in some depth. For these purposes, focus group participants could be composed of corridor drivers, employee organizations, carpoolers, community leaders, survey respondents, or other targeted groups.

Abuses. While focus groups are relatively easy to manage, they yield subjective information and should not be used to support quantitative estimates or rank alternatives. They are most effective in exploring the direct experience and reactions of participants, and less effective in addressing hypothetical issues with which the participants have no direct experience. "Would you buy a dog that flies?" is an example of a question which isn't likely to produce fruitful focus group results. "How would you react if we took a lane away from one of your busy freeways and dedicated it to carpools?" is another question which is more likely to generate polarized responses, but little insight, unless the participants have direct experience with a lane conversion project.

Examples. Several state DOTs, including those in Virginia and Washington, have used focus groups effectively to test HOV marketing materials. The Appendix A case studies of Hampton Roads I-64 and Seattle I-5 contain examples of this use. CALTRANS has used focus groups to explore public attitudes toward HOV lane conversion (Gard, et al., 1993) and HOV lane enforcement (Billheimer, 1990).

An example of a focus group protocol used in exploring driver attitudes toward HOV lane operation and enforcement appears in Appendix D. The protocol was designed to provide first-hand, in-depth responses to key issues regarding public perceptions of HOV use, enforcement activities, and violations on two Southern California freeways (State Route 91 and Orange County Route 55), and two Northern California Freeways (Marin Route 101 and Santa Clara Route 101). At one point in each of these focus groups, participants were asked to list a series of adjectives describing their carpool lane. The accompanying exhibit lists the results of this exercise.

Drivers in Southern California had a more negative view of their lanes than Northern California drivers. The words "scary" and "dangerous" recurred when drivers described the two Southern California lanes (Orange County Route 55 and State Route 91), but were not mentioned at all by Northern California drivers using Santa Clara 101 and Marin 101. The features mentioned by drivers finding the Southern California lanes "scary" were (1) the speed differential, (2) the threat of people pulling into the lane unsafely, and (3) the nearby Jersey barrier, which was right next to the two Southern California carpool lanes.

A. MARKET RESEARCH			PLANNING	
3. FOCUS GROUPS				
EXHIBIT: POSITIVE AND NEGATIVE ADJECTIVES USED BY FOCUS GROUP PARTICIPANTS TO DESCRIBE FOUR CALIFORNIA HOV LANES			2	
Freeway	SOUTHERN CALIFORNIA State Route 91 Orange County 55	NORTHERN CALIFORNIA MARIN 101 Santa Clara 101	SUN	MON
Descriptive Words				
POSITIVE				
Great	X			1
Fast	X			
Rewarding	X	X		
Progressive	X		7	8
Convenient	X	X		
Fair	X		14	15
Efficient		X		
Well Used				
NEGATIVE				
Scary	X	X		
Dangerous	X	X		
Waste of Space	X			
Mickey Mouse	X			
Nerve-Wracking	X			
Aggravating	X			
Tense	X			
Fearful				
Risky		X		
Frustrating		X		
Rough		X		
Empty		X		
Non-Functioning				
Insulting		X		
Unfair		X		
Inefficient				X
Unused				X

One State Route 91 driver noted:

"It's nervous driving (on State Route 91) when you have cars virtually standing still and you're driving at 60 mph. The differential speed makes for very nervous driving. And the ever-present threat of people pulling in...that's scary."

A carpooler on Orange County Route 55 found the lane so nerve-wracking that he didn't use it, even though he was qualified to do so.

"In the carpool lane you have on one side of you the fast lane, which is not really fast...and in the other direction you have a block wall. When somebody cuts in front of a person in the carpool lane, they've really only got one way to go and that's either to crash into the person, or go into somebody else's lane, or go into a block wall."

On Santa Clara Route 101, where a 10-foot median lane separates carpoolers from the Jersey barrier, none of the participating drivers volunteered the words "scary" or "dangerous" in describing the carpool lane. Although Marin 101 has no median lane, the speed differential separating the carpool lane from general traffic was not nearly so great as on the other three study lanes. Marin drivers were more concerned with under-utilization of their HOV lane.

"Empty. That's the perfect word. You're sitting there and you're mad because you see a car go by every two minutes, at 60 mph, and you're doing 25."

PLANNING		A. MARKET RESEARCH	
		4. TELEPHONE SURVEYS	
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Telephone surveys allow a more precise quantification of key questions than focus group research. They can be used to gather travel data, measure public opinions, document campaign awareness, record modal shifts, and track project acceptance over time.			

A well-designed and carefully executed telephone survey can document public reaction to HOV lanes and marketing campaigns with statistical precision and provide insights into the relative effectiveness of different campaign messages and media channels. Telephone surveys can be used to gather travel information and data, measure public opinions and attitudes, document awareness regarding HOV projects and marketing campaigns, record modal shifts, and track project acceptance over time.

Sample Sizes. A minimum of 400 surveys is generally necessary to guarantee that measured responses are within five percent of the true state of affairs. If the survey sample is to be subdivided significantly during the analysis, larger sample sizes may be necessary. Uncertainties regarding appropriate sample sizes should be resolved by consulting a statistician.

Population Definitions. If the population to be polled resides in a particular geographic area, a straightforward means of sampling is to draw telephone numbers at random from all the phone books covering that area. To ensure that unlisted numbers have the same chance of being reached as listed numbers, add a "1" to the last digit of the number drawn from the phone book sample. (Lists of randomly generated phone numbers for specific areas can also be purchased from firms specializing in providing this information.) It will usually be necessary to screen persons answering the phone to ensure that only licensed drivers are interviewed, and that a representative sampling of males and females is obtained.

If the population to be sampled consists of drivers using a particular corridor (or, more specifically, carpoolers in a particular HOV lane), it can be inefficient to phone residents at random trying to find drivers meeting the criteria. A more direct means of reaching such narrowly defined populations is to sample license plates along the route in question, use Department of Motor Vehicles (DMV) records to identify the registered owners of the observed vehicles, and look up the phone numbers of these owners. While this approach has been used effectively in some studies, it is not without problems. Barriers to this approach can include DMV privacy laws, unlisted phone numbers, leased vehicles, and ambiguous phone listings. In a recent polling of HOV lane users in the San Francisco Bay Area (Billheimer, 1990), it was necessary to videotape four license plates for every usable phone number generated.

Survey Content. Copies of sample questionnaires from a sampling of HOV lane surveys may be found in Appendix D. Typically, these surveys consist of the following major elements.

1. **Introduction and Freeway Use.** Introductory remarks designed to screen for licensed drivers who use the particular freeway and document the current extent of that use (i.e., How long have they used Marin 101? How often? As carpooler or lone driver?).
2. **Perceptions.** Questions designed to explore drivers' perceptions of such key issues as fairness, travel times, and HOV lane enforcement. The accompanying exhibit charts the response of Southern California drivers asked whether they agreed or disagreed with the statement "It is unfair to have special freeway lanes set aside for buses and carpools." Over eighty percent of the respondents (carpoolers and non-carpoolers alike) disagreed with this statement.

<div>A. MARKET RESEARCH</div> <div>4. TELEPHONE SURVEYS</div>	<div>PLANNING</div> <div><div>2</div><table><tr><th>SUN</th><th>MON</th></tr><tr><td></td><td>1</td></tr><tr><td>7</td><td>8</td></tr><tr><td>14</td><td>15</td></tr></table></div>	SUN	MON		1	7	8	14	15
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<div>EXHIBIT:SAMPLE RESPONSE TO TELEPHONE SURVEY QUESTION SHOWING AGREEMENT AND DISAGREEMENT WITH STATEMENT</div> <div>"It is unfair to have special freeway lanes set aside for buses and carpools."</div>									
<div>Source: Gard, et al. 1993</div>									

3. **Campaign Awareness (Unaided Recall).** Questions designed to probe, with no prompting, respondents' general awareness of recent HOV marketing campaigns.
4. **Specific Awareness (Aided Recall).** Questions designed to probe, through prompting, respondent awareness and understanding of HOV campaign materials and lane operations. Awareness of such specific issues as enforcement, violations, and fines can also be tested.
5. **Personal History vis-a-vis Carpool Lanes.** Specific questions designed to document any changes in travel time, route, trip timing, or carpool formation resulting from the introduction of HOV lanes or associated marketing campaigns. This may include questions regarding illegal use of the lane and personal citations for illegal use.
6. **Opinions and Attitudes.** Questions designed to document drivers' opinions of the HOV lanes themselves and explore public attitudes toward any contemplated changes in lane operations (i.e., carpool definition, operating hours, etc.).
7. **Demographics.** Questions designed to document the age, sex, and auto ownership status of the respondents.

<div>2</div>	PLANNING		A. MARKET RESEARCH	
			5. MAIL-BACK SURVEYS	
	SUN	MON	Mail-back surveys can be distributed directly to corridor drivers to sample awareness and attitudes, develop origin/destination data, and document route and mode shifts.	

Mail-back surveys consist of questionnaires which are either distributed to drivers at sampling stations such as freeway on-ramps or mailed to the registered owners of vehicles whose license plates were recorded using the project corridor. Samples of such surveys appear in Appendix D. Mail-back surveys have been used effectively to sample awareness and attitudes, develop origin/destination data, and document route and mode shifts.

Mail-back surveys can range from simple post-cards designed to capture origin/destination data (see Exhibit) to more elaborate two-page questionnaires documenting awareness, attitudes, commute choices, and demographic characteristics. Typically, the longer the questionnaire, the lower the response rate. Reported response rates for mail-back questionnaires used to monitor HOV projects range from 20% to 40%.

The advantage of mail-back questionnaires is that they can be distributed directly to the driving population in the corridors affected by proposed or existing HOV projects. While it is more difficult to track campaign awareness through mail-back surveys than through telephone surveys (unaided recall cannot easily be tested through mail-back surveys, for instance), issues regarding perceptions, attitudes, and mode choice can be pursued equally well by mail or by phone. Beginning in 1985, Houston has regularly used mail-back surveys to track motorist attitudes regarding their system of HOV transitways, opinions regarding transitory effectiveness, perceptions of time savings, and self-reported impacts of the transitways on mode choice (Bullard, 1991). Both Seattle and Orange County, California have used mail-back surveys to record HOV lane acceptance among carpoolers and non-carpoolers. CALTRANS and the California Highway Patrol have used mail-back surveys to track driver awareness of enforcement and violations before and after waves of HOV lane enforcement (Billheimer, 1990).

A.MARKET RESEARCH
5.MAIL-BACK SURVEYS

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EXHIBIT: SAMPLE POSTCARD SURVEY FORM

Source: Orange County Transit District, 1988

<div>2</div>	PLANNING		A. MARKET RESEARCH	
			6. EXECUTIVE INTERVIEWS	
	SUN	MON	Executive interviews can help to gauge transit market interest, identify institutional issues, establish community expectations, predict political reactions, and lay the groundwork for future liaison with opinion leaders and decision makers.	

Face-to-face interviews with opinion leaders and decision makers regarding planned HOV projects can be useful in gauging target market interest, group perceptions, community expectations, and likely political reaction. These interviews can also help to establish liaisons with business and political leaders as part of the important process of constituency building.

Participants in executive interviews "...should be selected based on their roles in the community, interest in the subject, and potential impact they could have on the study's outcome." (Stamm, 1991). The list of potential candidates for executive interviewers includes:

- elected officials
- business leaders
- community activists
- newspaper editors
- radio and television news directors
- chamber of commerce representatives
- tracking representatives

Once candidates have been selected, they are contacted by mail to request their participation in the interview process. Interviews should be carefully scripted, held to approximately one hour, and conducted in person at the participant's office or location of the participant's choice.

A sample Executive Interview script, drawn from the work of Pacific Rim Resources in studying Arterial HOV Alternatives in Snohomish County, Washington appears in Appendix D.

The interview requests feedback on HOV system components and design issues; elicits perceptions of HOV market potential, attempts to identify major public, institutional, and media challenges, and concludes asking interviewees whether they would be interested in participating in the project by reviewing and/or communicating study findings.

As in the case of focus groups, executive interviews provide in-depth insights, but have no statistical validity. As with focus groups, however, they can be used effectively in conjunction with more rigorous statistical sampling approaches such as telephone surveys. In a study of HOV facility design for Pierce County, Washington, telephone interviews suggested that the general public was likely to be more accepting of ramp metering and HOV treatments than community leaders expected (SR-16, SR-512/SR-167 HOV Facility Design Study Memorandum #6: Public Involvement).

A. MARKET RESEARCH

6. EXECUTIVE INTERVIEWS

PLANNING

**EXHIBIT: PURPOSE OF EXECUTIVE INTERVIEWS
CONCERNING HOV LANES**

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HEIGHTEN VISIBILITY AND VIABILITY of HOV treatments as an effective traffic congestion management technique.

ASSESS ATTITUDES regarding a variety of HOV treatments: where is there the greatest consensus and where are there the greatest differences?

IDENTIFY OPPORTUNITIES for regional partnership in building community awareness and support for this study, as well as HOV treatments in general.

IDENTIFY ANY SPECIFIC INSTITUTIONAL/ORGANIZATIONAL CONCERNS regarding the study, as well as HOV treatments in general.

OBTAIN INFORMATION about the communications challenges foreseen by the community/institutional leaders and solicit their assistance facilitating broader communication of the study process and ultimate outcomes.

Source: I-80/I-287 Feasibility Study, NJDOT

<div>2</div>	PLANNING		A.MARKET RESEARCH	
			7. TRAFFIC MEASUREMENTS	
	SUN	MON	Counts of the current number of carpools in a corridor targeted for HOV treatment give the most reliable basis for estimating early HOV lane usage, provide baseline measures for future elevations, and can alert marketers to potential pitfalls.	

As soon as a corridor has been singled out as a promising location for future HOV treatment, existing corridor traffic should be monitored to determine whether such treatments are likely to succeed, and if so, to identify the potential design, operating, and marketing problems presented by HOV lanes. Chapter 4, conveying project evaluation covers traffic monitoring issues in some detail (See Section 4-C, "Monitoring the Project.") At a minimum, the initial measurement process should ascertain:

- **Traffic volumes and speeds** at points along the corridor (including both primary and parallel routes) during peak hours and peak periods
- **Vehicle occupancy rates**, reflecting the number of 2+ and 3+ vehicles in the traffic stream during the peak operating periods. Again, counts should include both primary and parallel routes.
- **Typical origin-destination patterns**, including average trip lengths and trip times.
- **Congestion measurements**, including the location and deviation of congestion and the identification of bottlenecks.
- **Transit and rideshare patronage**, particularly those existing operations which could benefit from an HOV facility.
- **Future demand projections**, including growth factors for the corridor and parallel routes.
- **Design limitations** of the existing freeway facility.

The above measurements have been adapted from "High-Occupancy Vehicle Facilities, A Planning, Design, and Operation Manual" (Fuhs, 1990) which cautions that "candidate corridors should have enough congestion, offer adequate travel time savings, exhibit sufficient demand, and have reasonable potential for successful implementation and operation."

Counts of the current number of carpools in a corridor targeted for HOV treatment give the most reliable basis for estimating preferential lane usage during the start-up phase and provide a baseline measure for future evaluations. Techniques for translating the existing carpool population into future HOV lane use may be found in the "Planning, Design, and Operation Manual" cited above. Projections of future HOV lane use are just as important for marketing personnel as they are for planners. If, for example, initial usage projections suggest that fewer than 400 vehicles will be using the lane during the peak hour, marketing personnel will have to contend with the "empty lane syndrome" while demand builds. If initial design projections suggest that non-carpoolers will lose far more time than carpoolers gain, marketing personnel can expect to be faced with a serious outcry from drivers of single-occupant vehicles, followed shortly by howls from their elected representatives. Few HOV projects have managed to survive the onslaught that results if single auto drivers are disproportionately inconvenienced or fail to see a substantive improvement as a result of the HOV lanes.

A. MARKET RESEARCH	PLANNING									
7. TRAFFIC MEASUREMENTS	<table><tr><td>SUN</td><td>MON</td></tr><tr><td></td><td>1</td></tr><tr><td>7</td><td>8</td></tr><tr><td>14</td><td>15</td></tr></table>		SUN	MON		1	7	8	14	15
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EXHIBIT: DATA COLLECTION SCHEDULE FOR I-394 IN MINNEAPOLIS										

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Source: Transportation System Management Plan, Interstate 394 (Strgar-Roscoe-Fausch, 1986)

2	PLANNING		B. CONSTITUENCY BUILDING	
			1. OVERVIEW	
	SUN	MON	To build constituencies successfully, you must address the specific needs of targeted audiences.	

The goal of this section is to help develop a constituency building program as part of an overall public information plan. The following pages will provide a framework to secure broad-based support for HOV systems. The section is also designed to help gather information and solicit support of media, environmental groups, other agencies and potential users.

A well-executed constituency building program can:

- Ensure that the concept and design of the facility is compatible with the physical, social and aesthetic character of the impacted communities;
- Provide a basis for citizen support of changes in zoning, conditional use, and other matters affecting development and implementation;
- Help avoid costly delays that result from protracted or unresolved conflicts;
- Accommodate the opinions and viewpoints of dissimilar constituencies;
- Instill a spirit of cooperation and trust;
- Establish a reservoir of goodwill and cooperation that carries over into future activities.

Gather Information and Analyze the Situation

In planning communication strategies it is first necessary to establish several truths about your audience(s). You will be targeting an extremely diverse audience. Questions that need to be answered include: Who (specifically) is the audience? What do they know about HOVs and how do they feel about them? What other circumstances could impact their decisions? What do they know about you and how do they feel about you? What specifically do you want from them--increased knowledge, legislation or commitment to change behavior? What form of communication should be used that is most effective and efficient in reaching that audience?

Preliminary briefings are recommended to ensure that everyone who should be involved and informed is updated. Key staff and elected official briefings will provide essential guidance and coordination in developing a constituency building process.

Deliver the Right Message, to the Right Person, in the Right Place, at the Right Time, in the Right Way!

After you have analyzed the information you have gathered, you must develop a public information plan.

1. Segment your audiences by common interests and priority to the success of the project
2. Determine the results (action you want from them, knowledge you want them to have) you want from your communications efforts
3. Provide the information that will be of most interest to that audience
4. Identify the most effective location to provide information to them; work, home, public facility
5. Determine the most effective communications tool for those individuals and that location
6. Identify the most important intervals in the process to communicate with them
7. Communication programs should be coordinated, consistent and interesting to your audiences.

B. CONSTITUENCY BUILDING

1. OVERVIEW

PLANNING

EXHIBIT: INFORMATION GATHERING AND DISTRIBUTION TOOLS

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INFORMATION GATHERING

Public Hearings
Public Meetings
Questionnaires
Community Meetings
Focus Groups
Executive Interviews
Project Reviews
Surveys
Referenda

WHO is the audience?

WHAT do they know?

HOW do they feel?

WHAT do you want them to do?

DELIVER the
RIGHT message
to the
RIGHT person
in the
RIGHT place
at the
RIGHT time
in the
RIGHT way

INFORMATION DISTRIBUTION

Open meetings
Paid Advertising
News Releases
Legal Notices
Direct Mail
Public Displays
Posters, Signs
Newsletters
Guidebooks
Speakers Bureaus
Employee Meetings
Videos, Slide Shows
Open Houses
Neighborhood Meetings
Tabloids
Hotlines
Bus Tours
Brochures, Fact Sheets
Kids' Projects

<div>2</div>	PLANNING		B. CONSTITUENCY BUILDING	
			2. DATABASE DEVELOPMENT	
	SUN	MON	<p>Knowing your audience has always been vital. Keeping track of them has always been difficult. Communicating with them individually has always been next to impossible, until now.</p>	

Each individual and each organization will have strong opinions about your project, each will also have a different level of understanding. You can't treat each group or each individual the same. Mass communication methods are no longer adequate to communicate to an ever increasing and diverse audience.

Keeping Track

Computers have made it possible to understand and communicate with each of these individuals and organizations on a one-to-one basis. But to understand your audience, provide them adequate information and enjoy the maximum benefit of their support, you must keep track of them.

Create and maintain a database of individuals and organizations with whom you need to keep contact. Update the list frequently to make sure that you are reflecting the changing segments of the community. The database is not just for printing labels. You will want to understand the reasons for each individual's interest and be able to separate individuals with common interests. You will want to know whether an individual represents themselves or a large organization. You will want to be able to recall what materials, meetings and other communications have transpired with each individual and group.

We all expect that our government is listening to us, that our opinions are being heard and considered. Now more than ever, we have the opportunity to honor that expectation and communicate with our constituents on a one-to-one level.

It will also be useful to develop an inventory of local public involvement coordination opportunities. Throughout the project corridor, activities related to local transportation efforts are being planned. A central inventory will help identify opportunities to share and coordinate common efforts. These should include planning and public works departments as well as recreational and cultural activities such as annual fairs and festivals.

Suggestions for fields you may want to create in your database appear in the accompanying exhibit.

B. CONSTITUENCY BUILDING**2. DATABASE DEVELOPMENT****PLANNING****EXHIBIT: SUGGESTED DATABASE FIELDS****2**

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INDIVIDUALS

Name
Address
Phone Number
Fax Number
Areas of Interest
Committee Work
Type of Info Needed
Correspondence Notes

ORGANIZATIONS

Name
Address
Phone Number
Fax Number
Membership Info
Size
Key Individuals
Areas of Interest
Types of Info Needed
Quantities of Info
Needed
Meeting Data
Times
Locations
Correspondence Notes

MEDIA

Name
Address
Phone Number
Fax Number
Key Individuals
Transp. Reporter
Envrn. Reporter
Editorial Writers
Columnists
Talk Show Prod.
Program/Publication
Format
Lead Time
Circulation
Coverage Records
Correspondence

PLANNING		B. CONSTITUENCY BUILDING	
		3. EDUCATIONAL WORKSHOPS	
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It is necessary to share information and obtain input from key individuals and groups. Hosting educational workshops or charrettes will facilitate these objectives.			

*Tell me and I will forget.
Show me and I will remember.
Teach me and I will understand.
Proverb*

Once you have "qualified your leads" (identified those individuals, groups and agencies that have expressed interest in hands-on involvement) educational workshops should be considered.

Timing

These workshops should be held early in the planning process to help identify potential opportunities, critical issues, and potentially fatal flaws. Depending on the size of the project it may be necessary to hold several workshops, each focusing on different constituent segments.

Participation

Participation in the workshops should be by invitation and include individuals such as community and business leaders, elected officials, state, federal and regional agencies and transportation planners, special interest groups, environmental groups, tribes, etc.

Objectives of the Educational Workshop

1. Disseminate information
2. Invite the early participation by the affected public, governments, agencies, organizations
3. Identify significant issues and strategies to address them
4. Seek commitment for partnership activities
5. Identify other potential constituents

Planning

Workshop planning should include development of a theme, objectives, agenda (see Exhibit), workshop design, publicity, advance questionnaires, participant packets, and visual support materials, and an invitation list. Other preliminary activities include the selection of locations, the recruitment of speakers and facilitators, and the development of education criteria.

In many cases one workshop with ongoing communication with participants will be adequate. However, if there are too many issues to be addressed in the time available or if situations arise unexpectedly during the project so that it becomes necessary to alter the course of actions, it may be wise to assemble these groups again.

Speakers and workshop facilitators should be recruited to represent a cross section of constituents. Transportation organization leaders, elected officials, community leaders, Department of Transportation staff, representatives of impacted agencies such as parks, military or air quality, and consultants should be considered.

Before the meeting is held, provide the following information to those invited:

- Date, time and location of the workshop
- Description of the project
- Information on objectives of the workshop

B. CONSTITUENCY BUILDING 3. EDUCATIONAL WORKSHOPS	<div style="text-align: center; font-size: 2em; font-weight: bold; margin-bottom: 10px;">2</div> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;">SUN</td> <td style="padding: 2px;">MON</td> </tr> <tr> <td style="padding: 2px;"></td> <td style="padding: 2px; text-align: center;">1</td> </tr> <tr> <td style="padding: 2px; text-align: center;">7</td> <td style="padding: 2px; text-align: center;">8</td> </tr> <tr> <td style="padding: 2px; text-align: center;">14</td> <td style="padding: 2px; text-align: center;">15</td> </tr> </table>	SUN	MON		1	7	8	14	15
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EXHIBIT: POTENTIAL WORKSHOP AGENDA									

WORKSHOP AGENDA

I.INTRODUCTION BY PARTICIPANTS

II.REVIEW AGENDA AND EXPECTATIONS OF THE WORKSHOP

III.PROGRAM OVERVIEW

- Program description
- Implementation process and responsibilities
- Program schedule

IV.INFORMATION SHARING

- Each individual has an opportunity to identify issues and opportunities
- Identification of coordination/collaboration opportunities
- Identification of needs
- Identification of other potential partners

V.ACTION PLANNING

- Identify specific actions to be taken
- Assign responsibility for each action
- Create appropriate structures (committees, task force, etc.)
- Establish partnering agreements

VI.NEXT STEPS

- Establish tracking, correspondence, meeting process

VII.CLOSE

- Summarize actions

- Map of project
- Workshop agenda
- Contact person, telephone number and address
- List of attendees

Create an environment that facilitates a structured exchange of information. The setting and tone of the workshop should be relaxed and encourage interaction among attendees.

Follow-Up

Minutes and ongoing update information should be sent to all participants.

The input generated from these workshops will help you develop future action plans, particularly public involvement activities.

2	PLANNING		B. CONSTITUENCY BUILDING	
			4. INTERAGENCY COORDINATION	
	SUN	MON	Success in maximizing marketing efforts must rely on gaining the support of natural allies. Interagency coordination is one of the most important elements of any marketing plan.	
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Moving individuals out of SOV's is a significant behavior change. Significant for the individual, for business and for government. It is a long term effort involving interjurisdictional coordination and involvement from a variety of public and private organizations.

Many states have regulations which have forced the issue of interjurisdictional coordination. Mandates for commute trip reductions have spurred the private sector into taking an active interest in the development of facilities which will encourage their employees to rideshare or use transit. For states or regions with growth management mandates, concurrence -- the recognition that an action by one organization will likely have a "shock effect" on the jurisdictions of others -- has brought many organizations to the same table to wrestle with issues which effect them all.

Examples of Interagency Impacts

A DOT decision to implement an HOV facility along a corridor will have a pronounced impact on law enforcement. State police or state highway patrol representatives should not only be involved in planning the HOV facility, they can also help to market it. In some states an HOV violator may not only get a ticket from a watchful trooper, but also receive a ridematch application so the violator can meet a carpool partners and use the lane legitimately in the future.

Will the HOV facility cause some carpoolers to divert from their existing corridors to the new HOV corridor? Or cause non-carpoolers to change their routes? This revised travel behavior will have an impact on the local jurisdictions commuters will be traveling through. Staff members from the public works, traffic and planning departments need to be part of the HOV facility planning, design and implementation process. These staff members can also serve as a resource to gain access to jurisdiction mailing lists, promotion channels and education mechanisms.

Public transportation providers are also important to consider when planning, designing, implementing and promoting HOV facilities. Good analysis needs to be undertaken in the planning stages to understand who the market is for the HOV facility. What portion, if any, of the new HOV users will be switching away from riding the bus or train? Conversely, how can the transit agency use the HOV facility to entice more people aboard their buses and trains? How will the HOV facility be integrated into the ongoing public transportation marketing strategy?

Problems with Lack of Coordination

Examples from past HOV projects contain several instances in which a lack of interagency coordination and a failure to build constituencies with natural allies has created enormous problems with HOV implementation. In the case of the Santa Monica Diamond Lanes (see Case Study A-4), the degree of involvement and commitment to the HOV project varied greatly among the many agencies affected by transportation decisions. When the media spotlight turned on the project, the public saw "...not a united front but a number of public agencies and elected officials pointing accusing fingers at the lead agencies, while other officials remained prudently silent." (Billheimer, et al., 1977). Several public agencies responsible for transportation activities adopted an adversary role which hindered both the free flow of project information and the coordination of project decisions.

In the case of another controversial HOV project, on the Dulles Toll Road (see Case Study A-6), supervisors from the two affected counties passed resolutions against the lanes at the time they were

<div>B.CONSTITUENCY BUILDING</div> <div>4.INTERAGENCY COORDINATION</div>	<div>PLANNING</div> <div><div>2</div><table><tr><td>SUN</td><td>MON</td></tr><tr><td></td><td>1</td></tr><tr><td>7</td><td>8</td></tr><tr><td>14</td><td>15</td></tr></table></div>	SUN	MON		1	7	8	14	15
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<div>EXHIBIT:ORGANIZATIONAL STRUCTURE OF THE I-394 CORRIDOR MANAGEMENT TEAM</div> <div>(Source: I-394 Case Study, Phase I Report, October 1987)</div>									

scheduled to open. One board went so far as to forbid the county ridesharing office to mail out brochures advertising the HOV lanes.

The Minnesota Example

The Corridor Management Team assembled by Minnesota DOT (MN/DOT) in support of the HOV lanes on I-394 has often been cited as a model of interagency coordination. A block diagram showing the relationship of the Corridor Management Team to the participating agencies appears in the accompanying exhibit. This organizational structure provided top-down open support from within MN/DOT and promoted strong interagency cooperation with the project. The Phase I Case Study (October 1987) notes that "...the public commitment of the Commissioner and the major decision-making role of the Corridor Management Team were very important in achieving this support" and cites the importance of designating a single Corridor Manager with overall responsibility as a key factor in the project's success. Because responsibility was concentrated at within a single, identified individual, MN/DOT was able to respond immediately to any problems or criticisms.

These examples, and examples throughout this manual show how aggressively solicitation of "partnership" relationships can leverage your limited resources and significantly increase your marketing effectiveness. Take a look at the listing of potential partners in the POTENTIAL PARTNERS section in Chapter 1. Think about which of these agencies you'll need to bring into the loop to avoid operational conflicts and to assist in the marketing and promotion efforts.

2	PLANNING		B.CONSTITUENCY BUILDING 5.POLITICAL LIAISON	
	SUN	MON		
			1	A loss of political support can be fatal to HOV lanes.
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It's best to have allied politicians announce their support for your HOV project in advance of opening day. That's no guarantee that they won't succumb to pressure from their drive-alone constituents and attack your project after it's opened, but it makes it harder for them to do so.

Dave Roper

As representatives of the drivers affected by HOV lanes, elected officials will be on the front line when it comes to phone calls from frustrated SOV drivers who are either dissatisfied because they can't use the lane, or angry because they were cited for using the HOV facility illegally. How elected officials respond to these calls will depend in large part to how well prepared they are. A planned and ongoing cultivation strategy will enable them to understand the benefits and implications of HOV lanes and help to ensure their support when discussing HOV facilities with their constituents.

Elected officials rely heavily on the recommendations and information provided by their staff. In some cases it can be equally or more effective to talk with the staff person than with the elected official. If you have difficulty getting together with an elected official, request the name of the staff person they would like to represent them on this issue. Even if the elected official is available to you, it doesn't hurt to ask if there is anyone else in their office that should receive copies of materials.

Communication Tools

The following tools can ensure that information is being passed to this group while helping identify individuals most likely to be advocates or advisories.

- General (group) legislative briefing held at noon or early evening
- Individual briefings
- Written material (periodic or one time)
- Legislative staff meetings
- Committee/sub committee briefings
- Creation of an advisory committee of elected official staffers

As with any other part of your HOV development plan, you should give equal weight to assigning liaison responsibilities and objectives to staff members. You may also want to consider contracting a bill tracking service to identify and track legislation that applies to all areas of HOVs.

If you work for, or represent a public agency, chances are you are prohibited from lobbying. You can and should however, provide education. In addition several of the potential partners identified in Chapter One of this manual can and will be motivated to directly influence legislative decisions.

The Cost of Political Opposition

Failure to build support for HOV lanes among political leaders can have disastrous results. SOV drivers far outnumber HOV users in most jurisdictions, so if elected officials are not primed on the benefits of HOV lanes, a simple head count tends to pull them into the opposition camp. In the case of the Dulles

B.CONSTITUENCY BUILDING 5.POLITICAL LIAISON	<div style="text-align: right; padding-right: 10px;"> PLANNING </div> <table border="1" style="float: right; margin-top: 10px;"> <tr> <td>SUN</td> <td>MON</td> </tr> <tr> <td></td> <td>1</td> </tr> <tr> <td>7</td> <td>8</td> </tr> <tr> <td>14</td> <td>15</td> </tr> </table> <div style="font-size: 48px; font-weight: bold; margin-top: 20px;">2</div>	SUN	MON		1	7	8	14	15
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EXHIBIT:LEESBURG TODAY ACCOUNT OF POLITICAL BATTLE OVER DULLES TOLL ROAD									

Toll Road (see Case Study A-6), the U.S. congressman representing Northern Virginia spearheaded the opposition to the HOV lanes, wrote several letters to Virginia's governor asking that HOV restrictions be delayed, and ultimately engineered the demise of the lanes by attaching an amendment to a federal transportation appropriations bill banning HOV lanes on toll roads on federal lands--a proviso that applied only to the Dulles Toll Road. After HOV restrictions had been lifted on the Toll Road, the *Washington Post* took VDOT to task for failing to "...develop an early and comprehensive HOV strategy to educate the general public or local and state political leaders," noting that when the U.S. representative from Northern Virginia "...made his first non-public rumblings against HOV to the highway department, no official bothered to hold his hand in an attempt to ease his constituent-instigated apprehensions."

Political opposition in the form of a General Assembly bill brought about the lifting of HOV restrictions on the first segment of the Route 44 carpool lanes in Hampton Roads, Virginia. In the case of the Santa Monica Diamond Lanes, a politician who had pressured CALTRANS behind the scenes to open the lanes was one of the first to call openly for their removal when controversy developed. Recognizing the critical importance of political support to the success of HOV lanes, the Transportation Research Board (TRB) offered the following guideline for HOV development:

"Do not open HOV facilities during election campaigns unless there is firm support from elected officials. Otherwise, political dissent is nearly assured."

2	PLANNING		B.CONSTITUENCY BUILDING	
			6.ENFORCEMENT LIAISON	
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	7	8	Without enforcement, an HOV lane soon becomes an SOV lane.	
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Just as the general public needs to understand the rules and benefits of new HOV lanes, they also need to understand what will happen if they do not comply with the requirements of the new lanes and believe that the risk of apprehension is high and that penalties will be enforced if they are caught.

Enforcement Issues

Cooperation between enforcement and operating agencies is necessary both for smooth operations and for effective enforcement of HOV facilities. For this reason, enforcement representatives should be involved in planning at the earliest opportunity. Some of the issues to be addressed include:

- Enforcement areas where officers can safely observe lane operations and initiate pursuit;
- Refuge areas for patrol officers to pull over violators;
- Turn-around facilities;
- Personnel requirements;
- Regular monitoring of violation rates;
- Identification of tolerable violation rates;
- Issuing ridesharing information with tickets and warnings;
- Incident management procedures; and
- Start-up strategies.

Types of Enforcement

Four primary enforcement strategies are in use on HOV facilities (Miller, et al., 1978):

1. **Routine enforcement**, or those enforcement activities randomly conducted in concert with the normal assortment of duties undertaken by a uniformed police officer;
2. **Special enforcement**, which entails the specific planning, scheduling and application of police activities on an HOV facility for a period of time, as when a patrol car is specifically assigned to a particular HOV lane or bypass ramp;
3. **Selective enforcement**, which represents a combination of both routine and special enforcement. This is the most common means of enforcing HOV lanes, and guidelines have been developed which relate the level and duration of special enforcement activities to violation rates (Billheimer, et al., 1981; and Billheimer, 1990). The accompanying exhibit shows an example of the guidelines.
4. **Self-enforcement**, in which motorists and HOV users help to police the lanes by taking voluntary actions to report violators. While self-enforcement may be applied in conjunction with any of the first three strategies, Fuhs (1990) notes that "...it is not considered a stand-alone alternative."

B.CONSTITUENCY BUILDING 6.ENFORCEMENT LIAISON	PLANNING <table border="1"> <tr> <td>SUN</td> <td>MON</td> </tr> <tr> <td></td> <td>1</td> </tr> <tr> <td>7</td> <td>8</td> </tr> <tr> <td>14</td> <td>15</td> </tr> </table>	SUN	MON		1	7	8	14	15
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EXHIBIT:ENFORCEMENT GUIDELINES FOR RAMP METER BYPASS LANES									
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Public Information Support

Research has repeatedly shown that public information programs which notify the public of enforcement efforts increase the effectiveness of the enforcement activities and can reduce the officer presence required to achieve compliance goals. When HOV lanes are introduced, public information programs should stipulate usage requirements and make it clear that restrictions will be actually enforced and upheld by the courts. The levels of fines and other penalties (i.e. points on driving records) should be widely publicized.

Statistics on violation rates should be presented to the public as soon as they are available, along with other data on project use. Research (Billheimer, 1990) shows that drivers tend to over-estimate violation rates and are likely to become critical if actual violation rates rise above 10 percent. Roughly 90 percent of the drivers surveyed in a recent California study (Billheimer, 1990) felt that the illegal use of carpool lanes was a problem. (One-third of the drivers felt it was a serious problem, while an additional 54% rated the problem as minor.)

While public education in conjunction with visible enforcement can help to lower lane violation rates, there is no evidence that public information alone, in the absence of enforcement, can affect violations. Visible enforcement is needed to maintain the integrity of an HOV facility and is a key component of a successful project. Research has shown that drivers are most aware of enforcement on HOV lanes with facilities for visible enforcement such as ample median lanes or enforcement areas adjacent to the HOV lanes.

<div>2</div>	PLANNING		B.CONSTITUENCY BUILDING	
			7.JUDICIAL LIAISON	
	SUN	MON	Judicial support for enforcement and penalties is necessary to maintain HOV lane integrity.	
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Fuhs (1990) offers the following guideline penalties for HOV lane violations:

- Penalties should be significant enough to deter violators. Fines and demerits on a motorist's record should be considered.
- Widespread agency/political support should be solicited for adequate HOV penalties and for upholding penalties through the local traffic court system.

Fuhs also notes that "it is desirable that laws, at either the state or local level, specifically address occupancy infractions on HOV facilities. A basis for a specific statute can be 'failure to obey posted preferential traffic lane restrictions.'"

Fines should be high enough to discourage willful violators and graduated to deter repeat violators. Penalties on HOV projects in 1989 varied from \$40 to over \$246 for the first offense.

**CARPOOL
VIOLATION
\$246
MINIMUM FINE**

In California, fines progress from around \$250 for the first offense to over \$600 plus court costs for the third offense.

No matter how high the posted fines are, they are useless unless the judicial system upholds them. Because enforcement without penalties can destroy the integrity of your HOV program, you must include judges and magistrates in your constituency building activities.

Find out who hears traffic infraction cases on your freeways (judges, magistrates, etc.), and be sure those people know the important role they play in ensuring the viability of the facilities.

As individuals, judges may not agree with the concept of penalties for HOV infractions and given their heavy work loads, may be inclined to give low priority to these infractions.

To ensure that violators will be fully penalized under the law, it is important to provide information to those charged with levying infraction penalties.

As with legislators, the following tools can ensure that information is being passed while helping identify individuals most likely to be advocates or advisories:

- General (group) briefings
- Individual briefings
- Written material (periodic or one time)
- Creation of an advisory committee
- Evaluate records of penalties given for each judge.

B.CONSTITUENCY BUILDING

7.JUDICIAL LIAISON

PLANNING

**EXHIBIT:SELF-ENFORCEMENT PROGRAM BEGUN
IN THE SEATTLE AREA**

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Source: Reprinted from Seattle HOV Task Force Brochure, 1989

<div>2</div>	PLANNING		B.CONSTITUENCY BUILDING	
			8.IDENTIFYING MEDIA PARTNERS	
	SUN	MON	Talking to the people who talk to the public is one of the most important aspects of constituency building.	
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For 150 years the telegram represented the most immediate medium to deliver urgent messages. That service is now out of business. Technology and communications mediums are changing at a dizzying pace. In 1980 the number of televisions with remote controls was insignificant, there were no compact disks, very few videocassette recorders, and no video rental stores. Only restaurants used microwave ovens. Facsimile machines cost thousands of dollars, were only owned by large companies and took five minutes per page. There were no personal computers.

Each of the constituents in this section are important, but none can impact as many people in as short a time as the media. As with any other communications process the most effective way to influence another individual is friend-to-friend talking face-to-face. The next is friend-to-friend talking on the phone, then through letters etc. That is the reason we see advertisers using so many celebrity spokespersons, and it is also the reason that news media are so important. It is also the way to cultivate the media.

Most television commercials are either thirty or sixty seconds long. As a viewer you know that during that time someone is going to try to sell you something. So, you might take that opportunity to go to the kitchen or just "zap" to another station. However, the average television news story is one-and-one-half minutes long, delivered by someone we trust and is delivered in an environment we rely on for factual information.

Always remember that there is no such thing as the "general public." Media, like their readers, viewers and listeners reflect tremendous diversity. Just as you need to prioritize your audience, you need to prioritize the media.

HOV education and arguments to change commuter behavior are best presented during those times that an individual is driving. Using media that can deliver the HOV message and provide the individual the opportunity to make a behavior change while they are in their vehicle will yield the best results. Therefore radio provides a great opportunity to communicate with SOV drivers.

A list of media positions that should be cultivated and subjects to consider discussing with each appears in the accompanying exhibit.

B.CONSTITUENCY BUILDING		PLANNING									
8.IDENTIFYING MEDIA PARTNERS											
EXHIBIT:POTENTIAL MEDIA PARTNERS AND RELEVANCE TO HOV PROJECTS		2 <table><tr><td>SUN</td><td>MON</td></tr><tr><td></td><td>1</td></tr><tr><td>7</td><td>8</td></tr><tr><td>14</td><td>15</td></tr></table>		SUN	MON		1	7	8	14	15
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POSITION	RELEVANCE TO HOV										
TRAFFIC REPORTERS	Traffic reporters are the best marketers of HOV lanes on TV and radio. They can illustrate HOV lane benefits before and during the commute.										
HEALTH REPORTERS	Air quality has a significant impact on health. Health is one of the strongest motivators for behavior change.										
BUSINESS REPORTERS	The work place is changing. Businesses are not only complying with trip reduction laws but also managing a changing work environment.										
CONSUMER REPORTERS	The financial, emotional and health benefits of using HOV'										
GOVERNMENT REPORTERS	What is government doing to preserve quality of life.										
EDITORIAL BOARDS	HOV plans, timetables, primary reasons and significant benefits.										
NEWS DIRECTORS	HOV plans, timetables, primary reasons and significant benefits.										
TRANSPORTATION REPORTERS	HOV plans, timetables, primary reasons and significant benefits.										
INTERESTED REPORTERS	Many reporters have personal interest in stories and follow them. Keep track of your coverage and customize your approach for each person.										
LIFESTYLE EDITORS	Changes in the way we arrange our lives and think about our vehicles. Increased acceptance of individual responsibility for their environmental impacts.										
REAL ESTATE EDITORS	Impact of HOV access on a residential and business zones.										

PLANNING		B.CONSTITUENCY BUILDING	
		9.KEEPING THE MEDIA'S ATTENTION	
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It's important to establish a personal relationship with media representatives.			

As with all other constituents, you want to establish a personal relationship with media representatives. Try to meet face-to-face whenever possible. Explain that you are not pitching a story but want to provide information about current and planned HOV programs and discuss how, in what form and when, you can best provide relevant information to them.

Steps for Cultivating Media Representatives

Typical steps for cultivating media representatives are listed below:

- Place **introductory call** and request meeting;
- Mail **letter** thanking for phone time and confirming meeting;
- Attend **face-to-face meeting**;
- Send **thank you note** confirming agreements;
- Send first **press release**;
- Make **follow-up call** to explain specific significance of release to individual media reps;
- Send **thank you note** for any coverage.

Topics of Interest to the Media

As we discussed, consumers are more interested in the benefits of a product than in the features. The media will ask questions to reveal benefits to their audience and to them: Is this important to most of my audience? Will this information bring in additional audience? Is this important to my audience in all geographic locations?

News is also a victim of trends and it is currently the trend to pursue stories on government waste aggressively. The *Seattle Times* in Seattle, Washington began running frequent ads in late 1993 asking readers to "Blow the whistle" on government. That the media is watching government and reporting waste is a good thing. But, be prepared to answer questions related to the cost of any HOV program, and be prepared to provide meaningful "user-friendly" comparisons of costs and related benefits. Without such guidance, the media may draw their own conclusions based on comparisons which may or may not be valid.

B.CONSTITUENCY BUILDING		PLANNING									
9.KEEPING THE MEDIA'S ATTENTION											
EXHIBIT:TIPS FOR CULTIVATING THE MEDIA		2 <table><tr><td>SUN</td><td>MON</td></tr><tr><td></td><td>1</td></tr><tr><td>7</td><td>8</td></tr><tr><td>14</td><td>15</td></tr></table>		SUN	MON		1	7	8	14	15
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TIP	DESCRIPTION										
CLIPPING SERVICE	Many clipping services are available to read publications and clip articles. Use them to keep track of who is reporting about you and what are they saying.										
MEDIA LIST/TRACKING	Develop a media list of those individuals you want to keep informed. Track your contact with them and their coverage.										
GRAPHIC STANDARDS	Standardize media documents so recipients immediately recognize that they come from you.										
PROCEDURAL STANDARDS	If the media calls, who should they talk to? Who is the "official spokesperson?" Return all media calls within 20 minutes, etc.										
SPOKESPERSON TRAINING	What our positions are, how to dress, how to look, how to correct bad information etc.										
THANK YOU NOTES	The simplest and cheapest way to demonstrate sincerity. Send a copy to their supervisor.										
RESOURCE MATERIALS	Help them perform their job more easily. Create a file video for television stations of construction use etc. of HOV areas. Create an annual HOV-FACTS document of statistics, projections, impacts, and information.										
CRISIS RESPONSE TEAM	When things don't go as planned you need to identify a team of people to share information as quickly and accurately as possible.										

PLANNING		B. CONSTITUENCY BUILDING	
		10. ENVIRONMENTAL GROUP RELATIONS	
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Bumper-to-bumper traffic wastes an estimated 3 billion gallons of gasoline a year – 5% of the nation's annual gas consumption.			

The goals are the same for everyone: Move more people and goods in the safest, most cost effective, environmentally friendly process possible. Because HOV facilities can help communities realize that goal, environmental groups can be powerful allies.

Environmental groups will have very specific interest in the impacts of HOV projects. This interest is likely to fall within two basic areas.

1. Interest in impacts of HOV **construction** (on land use, wetlands, etc.)
2. Interest in the impacts of HOV **use** (on air pollution, fuel consumption, etc.)

It is important to remember that environmental groups with similar interests may have entirely different views of an HOV project. For example, it is not unusual for one group interested in air quality to support HOV lane construction because of the incentives it provides for carpooling and transit use. On the other hand, another air quality group might not support the construction of HOV lanes because they increase highway capacity.

As with the other segments of your audience you will want to use the same constituency building process with environmental groups:

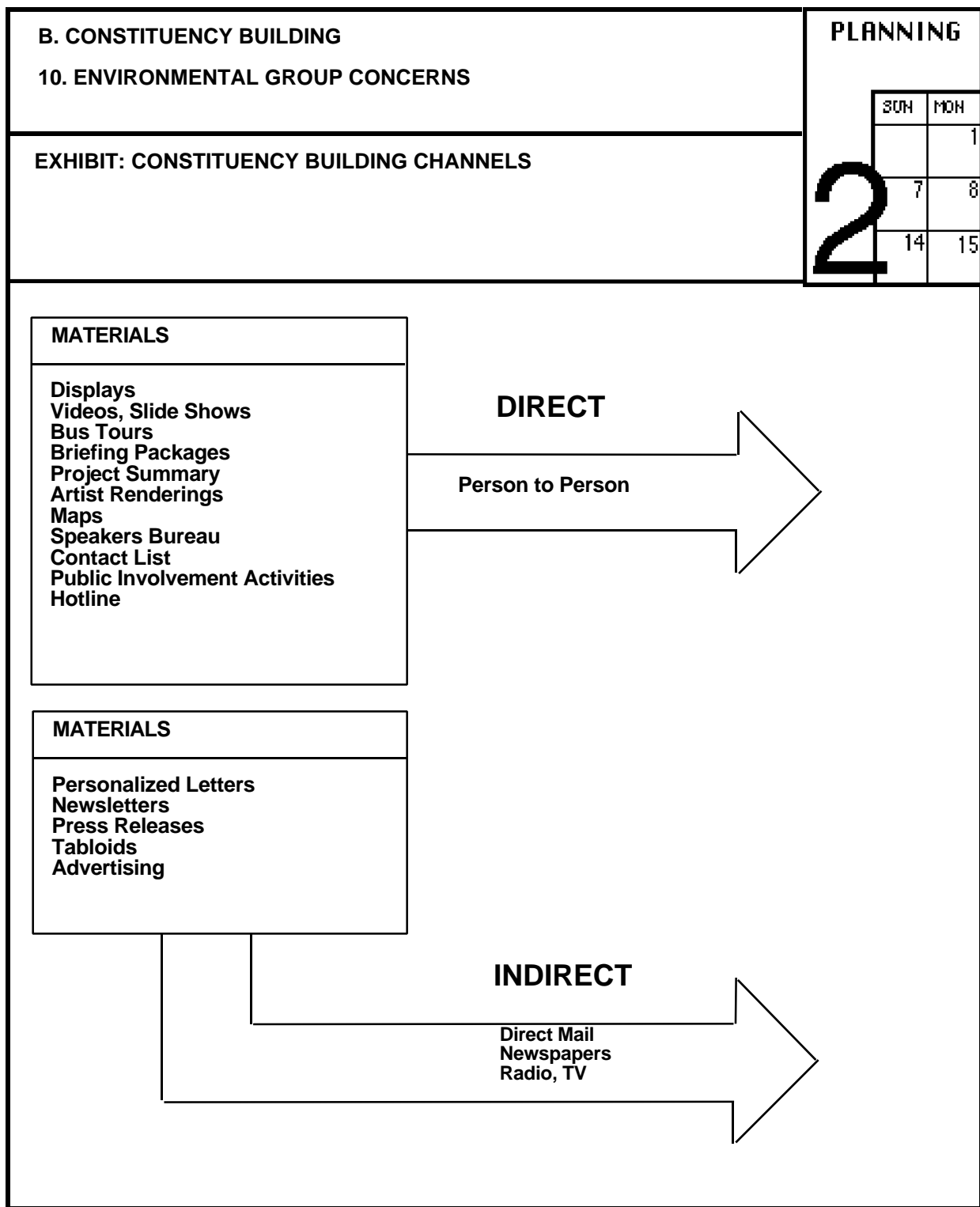
1. Identify Potential Audiences
2. Gather/Analyze Information
3. Prioritize Audiences
4. Identify and Develop Materials
5. Distribute Materials

Ask yourself:

1. Who is my audience?
2. What do I want from them?
3. What do they currently know and feel?
4. When and where is best to reach them?
5. What communication tool will be most effective?

The accompanying exhibit suggests several constituency building activities for environmental groups. The introduction to this subsection (Section B-1) contains additional recommendations.

During this process you should investigate opportunities for collaborative efforts. Once it is determined that opportunities exist, make a formal request for involvement. Some organizations using partnership activities are formalizing relationships with written Partnering Agreements.



Materials that are produced for use to cultivate constituents can be used by these groups to distribute their constituents. Materials that would lend themselves to "second generation" distribution include:

- | | | |
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| <ul style="list-style-type: none"> • Posters, signs • Displays • Brochures and fact sheets | <ul style="list-style-type: none"> • Newsletters • Hotline number • Kids projects | <ul style="list-style-type: none"> • Tabloids • Briefing packages • Video, slide shows |
|---|--|---|

<div>2</div>	PLANNING		B. CONSTITUENCY BUILDING 11. COMMUNITY RELATIONS A review of results from your market research and focused interviews will help identify issues and opportunities that may be unique for each community.
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Throughout this section we recommend specific strategies for each of the groups we have encouraged you to target. The strategies recommended are not for exclusive use with any single segment, but intended for consideration in developing *your* customized constituency building plan.

In addition to considering the groups and individuals with apparent interest in your project, you must also think of the broader characteristics of the community. Many groups and individuals will emerge and should be included in your constituency building, but you must also be proactive and reach out to include groups that may not be as vocal, such as ethnic minorities, people with disabilities, low-income and elderly citizens, grade- and high-schoolers, military personnel, industrial workers, and tribal members.

The following strategies can be effective in securing constituents in individual communities.

ACTIVITIES	
Activities validate the importance of invited individuals and help them visualize potential impacts.	
BUS TOUR	Invited guests take a bus ride to gain further understanding of project objectives, routes, processes, etc.
THANK-YOU RIDE	Once the facility is open give a VIP bus tour

MATERIALS	
Materials can provide accurate and timely information in detailed or broad strokes.	
NEWSLETTER	Specific information customized for that community
MEDIA RELEASES/ BRIEFINGS	Printed and verbal briefings and releases for editors and reporters keep them and their audiences informed
DISPLAYS/SPECIAL EVENTS	Transportation fairs, employment sites can use un-staffed displays to disseminate information and self-administered questionnaires
BROCHURES/BRIEFING PACKAGES/FACT SHEETS	Basic information for wide distribution and specific/customized information for each community
PAID ADVERTISEMENTS	Invite community participation in public review stages and opening events
SIGNAGE	Signs along the corridor can alert residents to significant events and solicit their involvement

B. CONSTITUENCY BUILDING		PLANNING									
11. COMMUNITY RELATIONS		<div>2</div> <table><tr><td>SUN</td><td>MON</td></tr><tr><td></td><td>1</td></tr><tr><td>7</td><td>8</td></tr><tr><td>14</td><td>15</td></tr></table>		SUN	MON		1	7	8	14	15
SUN	MON										
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EXHIBIT: ACTIVITIES, MATERIALS, MEETINGS, AND FEEDBACK CHANNELS FOR BUILDING COMMUNITY RELATIONS											
MEETINGS/WORKSHOPS											
Although expensive, face-to-face communication strategies are usually the most effective and cost-efficient.											
JURISDICTIONAL BRIEFINGS	Briefings for elected officials, staff and public organizations										
SPEAKERS BUREAU	Allows targeted outreach to groups and provide feedback channels										
PUBLIC MEETINGS/OPEN HOUSES	Allows individuals to share specific interests without impairing participation/information needs of others										
NEIGHBORHOOD MEETINGS	Opportunity for close interaction between citizens and project officials										
LEADERSHIP WORKSHOPS	Provide a structured process for briefing and soliciting participation of elected/community leaders										
EMPLOYMENT SITE MEETINGS	HOV facilities can have significant impact on employees of large organizations										
ISSUE-SPECIFIC MEETINGS	Provide forum to discuss issues of a particular concern										
PERSONAL CONTACT WITH LANDOWNERS	Door-to-door visits with corridor residents can significantly impact how they feel about the project										

FEEDBACK CHANNELS	
The door should always be open for feedback. The following two strategies are easy and effective ways for individuals to reach you outside of the formal meeting environment.	
HOTLINE	A phone line dedicated for use by citizens to provide feedback and access information
MEETING QUESTIONNAIRES	Simple way to collect quantifiable results from those attending and allows less vocal participants to express their interest

PLANNING		C.CAMPAIGN OBJECTIVES AND STRATEGIES	
2		1.OVERVIEW	
		This section deals with three key marketing activities: (1)Setting campaign objectives; (2)Developing strategies to meet these objectives; and (3)Getting professional help.	
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Setting Campaign Objectives

The first step in undertaking an HOV marketing campaign is the setting of well-defined objectives. Objectives may be broad ("Increase regionwide acceptance of ridesharing") or narrow ("Cause carpooling on I-394 to increase by fifteen percent"). However, they should be defined explicitly, since the development of campaign strategies, from the definition of target audiences to the selection of media channels, will be tied to these objectives.

Developing Campaign Strategies

The discussion of campaign strategy in this section addresses the following issues:

Identifying Key Issues. Key issues surrounding HOV lanes typically involve such topics as congestion, mobility, safety, equity, and ecology. It is important to identify those issues and develop positioning statements capable of focusing marketing activities and developing realistic project expectations.

Defining Target Audiences. It is essential that the primary and secondary audiences for the marketing campaign be well defined and carefully targeted. Key incentives will vary by audience segment.

Budgeting. The campaign strategy and media mix for a public marketing program will be directly related to the amount of available funds. Marketing directors must find sufficient funding and allocate them among different communication channels to reflect campaign priorities.

Scheduling. Marketing activities should start early in the project planning stages, peak at the time a project opens, and continue throughout the life of the project.

Getting Professional Help. While public agencies can take the lead in carrying out HOV marketing campaigns, most lack the in-house capability to develop marketing materials. The assistance of professional advertising agencies should be sought in developing campaign concepts, producing campaign materials, and coordinating media distribution.

C. CAMPAIGN OBJECTIVES AND STRATEGIES

1. OVERVIEW

**EXHIBIT: WASHINGTON STATE HOV SYSTEM MARKETING
AND PROMOTION POLICY**

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Source: Washington State Freeway HOV System Policy (Washington State DOT, 1992).

PLANNING		C.CAMPAIGN OBJECTIVES AND STRATEGIES	
2		2.SETTING CAMPAIGN OBJECTIVES	
		Marketing objectives should be defined explicitly, since the development of campaign strategies will be tied to these objectives.	

Marketing objectives may focus broadly on building regionwide acceptance of ridesharing and more narrowly on convincing the non-carpoolers in a specific corridor to shift to carpooling. Whether broad or narrow, marketing objectives should be defined explicitly, since the development of campaign strategies will be tied to these objectives.

The accompanying exhibit lists a number of possible campaign objectives culled from a variety of sources. These objectives are discussed in more detail below.

Heighten public awareness of ridesharing as an option. One broad objective of a marketing campaign can be to heighten public awareness of ridesharing by publicizing the benefits of ridesharing throughout the community and emphasizing that the mission of the transportation system is to move people, and not just vehicles.

Increase public confidence in HOV strategies. In some locales, whether because of past HOV failures or general lack of familiarity with the HOV concept, it may be necessary to build public confidence in HOV strategies. Public confidence can sometimes be established by fostering an opening planning process and advertising the success of HOV lanes in different areas.

Develop accurate expectations for HOV facilities. Unrealistic public expectations can damage the credibility and morale of sponsoring organizations, erode public confidence, and create opposition to the HOV concept. Stamm (1991) points out that it is not uncommon for an HOV facility that is technically successful to be "...viewed as a failure by your constituent groups because 'they don't look full' or because 'congestion is just as bad as before you opened the lane.'" One objective for an HOV marketing team is to shape accurate expectations of what an HOV facility can and cannot accomplish.

Prepare people for the coming of an HOV facility. One common purpose of HOV marketing activities is to publicize the coming of an HOV facility by keeping the public informed of construction activities, advertising usage requirements, creating an awareness of HOV lane signage, and "counting down" the number of days before a project opens.

Promote immediate use of HOV facilities. The most common objective of HOV marketers is to sell a specific project to potential HOV users in an attempt to get them to take up ridesharing.

Open channels for two-way communication. One objective cited by the advertising firm marketing I-394 in Minneapolis was "to provide a means of two-way communication with the affected communities and any other interested individuals which will help alleviate ill will during construction, provide a means of feedback, provide a vehicle to help measure marketing program results and to build a database for direct mail." (Minnesota DOT, 1993)

C.CAMPAIGN OBJECTIVES AND STRATEGIES	PLANNING								
2.SETTING CAMPAIGN OBJECTIVES									
EXHIBIT:TYPICAL CAMPAIGN OBJECTIVES	<div>2</div> <table><tr><th>SUN</th><th>MON</th></tr><tr><td></td><td>1</td></tr><tr><td>7</td><td>8</td></tr><tr><td>14</td><td>15</td></tr></table>	SUN	MON		1	7	8	14	15
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<ul style="list-style-type: none">•HEIGHTEN PUBLIC AWARENESS OF RIDESHARING AS AN OPTION;•INCREASE PUBLIC CONFIDENCE IN HOV STRATEGIES;•DEVELOP ACCURATE EXPECTATIONS FOR HOV FACILITIES;•PREPARE PEOPLE FOR THE COMING OF THE HOV FACILITY;•PROMOTE IMMEDIATE USEOF HOV FACILITIES;•OPEN CHANNELS FOR TWO-WAY COMMUNICATIONS;•CONVINCE DRIVE-ALONE COMMUTERS TO RIDESHARE ONCE A WEEK;•CREATE AWARENESS OF SUPPORT FACILITIES;•PROVIDE UPDATED ACCOUNTS OF HOV LANE TIME SAVINGS AND USAGE.									
Sources: Stamm, 1991; Young and Baird, 1994; and Bloch, et al., 1994									

Convince drive-alone commuters to rideshare once a week. An example of a more limited objective, the "Team Rideshare" campaign undertaken by CALTRANS in 1993 emphasized a one-day-a-week switch to ridesharing in an effort to inspire drive-alone commuters to sample ridesharing and to overcome the perception that ridesharing necessitated a full-time commitment. (Young and Baird, 1944)

Create awareness of support facilities. In the past, some HOV marketing campaigns have aimed to make the public aware of such support facilities as park and ride lots or rideshare matching services.

Provide updated accounts of HOV lane time savings and usage. One stated objective of ongoing marketing campaigns for existing HOV facilities is to publicize HOV lane time savings and usage on an updated basis in an effort to induce more non-carpoolers to try ridesharing.

Any given HOV marketing campaign may have only two or three of the above objectives. Over a period of years, however, marketing campaigns dealing with the planning, introduction, and implementation of a particular HOV facility might have occasion to address most of these objectives.

PLANNING		C.CAMPAIGN OBJECTIVES AND STRATEGIES	
2		3.IDENTIFYING KEY ISSUES	
		Key issues concerning HOV facilities must be identified and addressed openly so that positioning statements can be developed capable of focusing marketing activities and developing realistic public expectations.	

Key issues surrounding HOV lanes involve such topics as congestion, efficiency, mobility, safety, equity, and ecology. One reason that HOV lanes can be a "tough sell" is that their impacts on some of these key issues are ambiguous.

Congestion. HOV lanes must exist in an atmosphere of congestion. If there is no congestion, there will be no time advantage available to ridesharers. Further, in order for HOV lanes to be accepted, people must perceive that congestion exists and is a serious problem.

Efficiency. HOV lanes improve the efficiency of the transportation system by moving more people in fewer vehicles.

Relative Mobility. HOV lanes improve the mobility of ridesharers by saving them time and money and providing reliable, congestion-free service. Generally, however, HOV lanes are not perceived as a benefit by non-carpoolers. Additional space made available to non-carpoolers when carpoolers shift to their own lane is soon filled with latent demand, so that single occupant vehicles perceive little change in their own travel time. If the HOV project has been designed in such a way that non-carpoolers lose more time than carpoolers gain, moreover, public outcry could be sufficient to sink the project.

Equity. Is it fair to give ridesharers a better trip? Most surveys addressing this issue have found that the vast majority of drivers (carpoolers and non-carpoolers alike) see HOV lanes as fair and equitable. A small minority feel that HOV lanes unfairly deny access to taxpaying non-carpoolers. This minority can be vocal, particularly if the improved HOV trip is perceived to come at the expense of a worsened SOV trip.

Safety. Many HOV lane configurations improve road safety. This is typically true of meter bypasses and barrier-separated facilities. However, some (but by no means all) configurations with no separation between mixed flow lanes and HOV lanes have raised legitimate safety questions.

Ecology. The effects of HOV lanes on air quality are not well understood. To the extent that they induce more people to travel in fewer vehicles, they save gasoline and cut emissions. Additional congestion in mixed flow lanes can, however, lead to increased emissions.

In addressing these issues, it is helpful to develop positioning statements capable of focusing marketing activities and developing realistic project expectations. A list of sample positioning statements culled from existing projects appears in the accompanying exhibit. These information capsules address the key selling points of an HOV system and provide a solid base for developing campaign materials and discussing an HOV project with elected officials, the news media, citizens, civic groups, and other audiences.

It is incumbent upon the HOV marketing team to shape accurate public expectations of what an HOV facility can and cannot accomplish. Stamm (1991) points out that:

C.CAMPAIGN OBJECTIVES AND STRATEGIES

3.IDENTIFYING KEY ISSUES

EXHIBIT: SAMPLE POSITIONING STATEMENTS

PLANNING

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•CHANGING TRANSPORTATION SYSTEM

–Congestion is a fact of life in our community.

–Area growth places additional demands in our transportation network.

–New federal laws restrict adding conventional lanes to our freeways.

•HOV LANES BENEFIT RIDESHARING COMMUTERS

–HOV lanes save time and money for ridesharing commuters.

–HOV lanes reduce stress by providing a reliable, congestion-free ride.

•HOV LANES BENEFIT THE COMMUNITY

–HOV lanes improve freeway utilization by moving more people in fewer vehicles.

–Fewer vehicles can mean less gas consumption and less pollution.

•HOV LANES CAN WORK

–HOV lanes have been successfully implemented throughout the U.S.

–HOV lanes provide a mobility option for those who can rideshare.

–HOV lanes have user-friendly support systems in the form of park-and-ride lots, ridematching services, employer programs.

–HOV lanes are just a part of the solution to transportation problems.

Sources:Adapted from"Positioning Statements, Hampton Roads HOV Systems" (VADOT, undated); (Young and Baird, 1994); and (Bloch, et al., 1994).

"Unrealistic public expectations can be extremely damaging to the credibility and morale of the organization undertaking the HOV project. They can also erode public confidence in the organization's ability to carry out it's mission. On the other hand, when the public (and the public's designated decision makers, such as elected officials, local jurisdictions staff, etc.) has been included in the planning process, expectations are much more likely to accurately reflect the goals, objectives and expected benefits and outcomes of the project."

It is particularly important that HOV lanes not be billed as *the* solution to an area's transportation problems. Fuhs (1990) makes this point succinctly in summarizing the key advantages of HOV systems.

"...HOV facilities have proved cost effective for increasing mobility in urban freeway corridors. They can accommodate growth in travel demand, and they can serve the public with increased efficiency. However, they are not a "cure-all" for urban and suburban transportation problems. They are only part of the solution. Their use in corridors where justified can make a significant improvement for those who choose to take transit or to rideshare."

<div>2</div>	PLANNING		C.CAMPAIGN OBJECTIVES AND STRATEGIES 4.DEFINING TARGET AUDIENCES <i>The question is not:</i> How do we reach the largest number of people with the same message? <i>The question is:</i> How, when, where, and with what message do we communicate to these non-carpoolers with the best likelihood of becoming ridesharers?
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Simplistically, effective advertising and media communication involves creating customized messages and directing them appropriately and efficiently at carefully defined audiences. When embarking upon any public information campaign, it is crucial that the "public" be carefully defined. What is the primary audience? What are the major characteristics of members of that audience? How old are they? Where do they live? What do they do? In developing an HOV marketing program, it is crucial to *develop as detailed a profile as possible* of the primary and secondary audiences for the public outreach campaign. Effective HOV marketers should become sleuths--learning as much as possible about the persons they are trying to reach with campaign messages.

HOV marketing campaigns can be aimed at a number of target audiences. Potential target populations include:

- Corridor drivers
 - Non-carpoolers
 - Carpoolers
- Employers
- Corridor businesses
- Community groups
- Area residents
 - Corridor residents
 - Population at large
- Public agencies
- Decision-makers
- Media representatives

Part of the HOV marketing process involves defining key segments of the target audience and identifying their concerns so that they can be addressed openly and honestly. The market research procedures discussed in Section 2A can help both in defining the composition of target groups and identifying their concerns.

Probably the most important group to be targeted by an HOV marketing campaign contains those individuals who currently drive alone in the HOV corridor but who are likely candidates for future carpools. It is essential to recognize that this group is likely to represent a relatively small proportion of current drivers. A survey conducted in advance of HOV lanes on the Long Island Expressway (Bloch, et al., 1994) found that only twenty percent of existing expressway users were willing to consider carpooling as an option. Market research conducted prior to the opening of I-394 in Minneapolis determined that only ten percent of existing corridor users would consider switching to carpooling or busing when the Express Lanes were complete. (Strgar-Roscoe-Fausch, Inc., 1986). Females under the age of 35 represented the most likely target for this mode shift.

Market research can help to identify the population most likely to shift to carpooling and isolate the messages most likely to appeal to members of that population. The more information that marketers can obtain about their primary audience, the easier it is to target the media to reach that audience. Generally, the two most important audience characteristics for media purposes are age and gender. Other characteristics that may be of use in identifying members of the primary and secondary audience are place of employment, location of residence, household size, occupation, automobile access, income, and educational background. Once an audience profile is complete, material creation, media mix, and campaign targeting can be accomplished much more efficiently.

C.CAMPAIGN OBJECTIVES AND STRATEGIES	PLANNING									
4.IDENTIFYING TARGET AUDIENCES	<table><tr><td>SUN</td><td>MON</td></tr><tr><td></td><td>1</td></tr><tr><td>7</td><td>8</td></tr><tr><td>14</td><td>15</td></tr></table>		SUN	MON		1	7	8	14	15
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EXHIBIT:WHILE THE DRIVE-ALONE COMMUTER IS A PRIMARY HOV MARKETING TARGET, RELATIVELY FEW ARE WILLING TO SWITCH MODES										

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Source: Reprinted with permission from *Star Tribune*, Minneapolis

<div>2</div>	PLANNING		C.CAMPAIGN OBJECTIVES AND STRATEGIES 5.BUDGETING The campaign strategy and media mix for an HOV marketing campaign will be directly related to the amount of available funds.
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"Half the money spent on advertising is wasted. The trouble is, nobody knows which half."

The first questions asked by a commercial advertising agency when approached about handling a campaign are, "Who are you trying to reach?" and "How much money do you have?" The size of your budget determines the type of campaign you will be able to wage, and consequently guides all planning and implementing activities. If you're working with a million dollars to reach a target population, then you can consider substantial television production and placement activities. If you've got \$40,000 for the same effort, you'd better plan on cultivating a great deal of in-kind support and cooperative ventures. By using materials from the public domain and relying exclusively on public service advertising, it is possible to conduct an effective campaign on a shoestring budget.

Regardless of the size of your available funds, your planning strategy should make extensive use of free or inexpensive marketing avenues: public service advertising; radio and television talk and magazine shows; donated outdoor advertising space; "piggyback" distribution of print materials; and in-kind fundraising activities.

To carry out the entire realm of activities required for an effective public outreach campaign, the full arsenal of media materials should be at your disposal. In a fully-rounded campaign, these include: television PSAs, radio PSAs, one- and two-color print ad slicks; premiums; press kits; billboards; basic information brochures; posters; flyers; newsletters; and speaker's bureaus. You should be able to prepare and distribute all of these items for a budget of under \$150,000. As the budget amount increases, the quality of the products and the sphere of distribution can naturally increase. As the budget increases further, paid media placement can be considered.

The accompanying exhibit shows the size of the first year's marketing budgets for the HOV projects described in the case studies of Appendix A. These budgets range from negligible to \$400,000. The size of the marketing budget is not necessarily correlated with the success of the project. One of the most successful projects listed, the San Francisco-Oakland Bay Bridge, received a negligible amount of marketing, while the failed Santa Monica Diamond Lanes had a marketing budget of \$358,000. As has been noted, it's easy to sell a good project, but no amount of marketing can make a flawed HOV concept acceptable to the driving public.

The exhibit shows a wide variety of funding sources for HOV marketing activities. The Minnesota Department of Transportation used federal interstate monies to advertise the coming of the Sane Lane on I-394. CALTRANS combined an UMTA grant with state and county funding to publicize the Santa Monica Diamond Lanes. Seattle relied heavily on WSDOT funding to market the southern branch of HOV lanes on I-5.

The Washington State DOT (WSDOT) was one of the first State Transportation Agencies to recognize the importance of marketing activities in introducing and operating HOV projects. Their *Freeway HOV System Policy* states that "Education and marketing elements shall be included in project development and construction expense for each major HOV project." (WSDOT, 1992). In recent years, the Intermodal Surface Transportation Efficiency Act (ISTEA) has made federal highway funds available to encourage public involvement in state and local ridesharing projects.

C.CAMPAIGN OBJECTIVES AND STRATEGIES

5.BUDGETING

EXHIBIT:FIRST YEAR MARKETING BUDGETS FOR SAMPLE HOV PROJECTS

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HOV PROJECT	YEAR	FIRST YEAR MARKETING BUDGET	FUNDING SOURCES
DULLES TOLL ROAD	1992	\$12,000	VDOT
HAMPTON ROADS I-44	1986	40,000	VDOT
HAMPTON ROADS I-64	1992	300,000	FHWA, VDOT, State Transit
MINNESOTA I-394	1986	400,000	Federal Interstate Funding (90%); State (10%)
SAN FRANCISCO/OAKLAND BAY BRIDGE	1971	Negligible	CALTRANS
SANTA MONICA DIAMOND LANES	1976	358,000	UMTA (69%); State (14%); County (17%)
SEATTLE I-5	1991	41,530	WSDOT

PLANNING		C. CAMPAIGN OBJECTIVES AND STRATEGIES	
2		6. HIRING PROFESSIONALS	
		It is best to let people who know what they are doing do what they do best.	

"Every American man thinks that he can sing tenor, play shortstop for the Yankees and write ad copy."

Old Husband's Tale

There is a commonly held myth that hiring professional consultants is a waste of time and money. The myth is true only if you hire the wrong professionals for the wrong tasks. When marketing an HOV project, it is crucial to bring people on board who know what they are doing--those who possess the skills and resources to develop a successful campaign, promote the product, and educate the public. Webster's Dictionary describes the adjective "professional" as "showing a sound workman's command." In each marketing specialty, let the professional workmen carry out their duties to help you reach your marketing and campaign goals.

Difference between Advertising and Public Relations Agencies. Advertising agencies are best equipped to create, produce and place the various forms of paid media. Public relations firms specialize in obtaining press coverage and utilizing free media channels to generate public support for projects and products. The chart on the opposite page summarizes the specialties of each type of firm. Many agencies are "hybrid" organizations that can carry out the majority of advertising and public relations activities in-house for an HOV project. If the expertise does not exist internally at an agency, most have a working relationship with associated firms whose skills are complimentary.

Selecting professional consultants. In selecting the appropriate agency or agencies, a number of processes can be utilized. The issuing of a Request for Proposal (RFP) for the desired services is the most common approach. One alternative is to issue an initial RFP for a firm or firms to design your marketing and information plan. You may wish to hire your selected consultants to carry out the marketing plan they developed, or you may find it best to issue a new RFP for the implementation of the plan. In any case, carefully specify the desired task areas of the project, the desired objectives of the campaign, the range of funds available, etc. Effective RFP evaluation schemes use a weighted average to compare submitted budgets --as opposed to a simple low bid process. Pay attention to the references of proposing firms, and thoroughly interview the account personnel who would be assigned to your HOV project to help assure compatibility. When selecting your media team, don't forget to look at philosophical credentials and conflicts of interest. A media team that believes in what you are trying to accomplish will do a better job at reaching your goals than an unmotivated but qualified one.

Advertising agencies have established relationships with media outlets and are savvy to placement contracts, schedules, etc. Many media buys can only be made by an advertising agency--not directly by the client. Bona fide advertising agencies receive a discount for placement usually equal to 15% of the published rates. You pay \$100 for a spot, and the agency pays \$85.00. Some agencies (if the placement budget is large enough to allow it) pay for the production of media spots from this discount, but it is more likely that the production costs will itemized in the agency budget and be paid directly by the client. In this case, the placement discount represents the agency's profit.

C. CAMPAIGN OBJECTIVES AND STRATEGIES		PLANNING									
6. HIRING PROFESSIONALS		<div>2</div> <table><tr><th>SUN</th><th>MON</th></tr><tr><td></td><td>1</td></tr><tr><td>7</td><td>8</td></tr><tr><td>14</td><td>15</td></tr></table>		SUN	MON		1	7	8	14	15
SUN	MON										
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EXHIBIT: SPECIALTIES OF ADVERTISING AND PUBLIC RELATIONS FIRMS											
SPECIALTIES OF ADVERTISING FIRMS	SPECIALTIES OF PUBLIC RELATIONS FIRMS										
Market Research Media Creation Graphic Design Logo and ID Development Posters, Brochures, Collateral Premiums/Special Items Television Advertisements Radio Advertisements Print (Newspaper and Magazine) Ads Packaging Direct Mail Pieces Premiums Media Placement Television Radio Newspaper Magazine/Trade Outdoor	Strategic Marketing Planning Logo and ID Development Ongoing Media Relations Copywriting & Editing Press Kits Press Releases Publicity Special Event Planning Special Events Media Training Speech Writing Public Spokespersons Newsletters Response to Public Inquiries Media Coverage Tracking Talk Show Scheduling										

Case Study References. As many sections of this manual illustrate, the initial design of an HOV project and the careful planning of the marketing and information campaigns are the most important determining factors in its marketing effectiveness. Advertising professionals helped to market Minnesota I-394 and Seattle I-5, both successful projects. As was shown in the case of the San Francisco-Oakland Bay Bridge HOV Lanes, however, a good project can market itself. The two most conspicuous failures in the case studies of Appendix A are the Santa Monica Diamond Lanes and the Dulles Toll Road HOV Lanes. Neither of these projects employed professional advertising agencies. However, it is unlikely that the best professional advertising firms or public relations experts could have saved these flawed projects, unless they were involved enough at the planning stages to have influenced design decisions.

<div>2</div>	PLANNING		C. CAMPAIGN OBJECTIVES AND STRATEGIES	
	SUN	MON	7. SELECTING MEDIA CHANNELS	
			A good media mix for an HOV project marketing and informational campaign utilizes all the various paid and public service media channels available--with final selections made on the basis of the costs and benefits of each in relationship to the available budget.	
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Major Media Channels. The media channels which can be utilized by an HOV project for marketing and informational purposes are similar to those for corporate marketers, with public service channels thrown into the mix. They include: radio, television, newspaper and periodical advertising; posters, brochures, newsletters and direct mail pieces; outdoor advertising, roadsign signs, bus-side and interior transit advertising; premiums; outreach videos and electronic communications. Those channels which offer "free" space or time in some measure to public service projects include radio, television and billboards. The chart on the opposite page shows some disadvantages and advantages of each type of media channel for HOV project use. More specific discussions of each type of media may be found in Sections 2D and 3B.

Selecting the Media Mix. The selection of a media mix and the prioritization of certain media channels is dependent upon three major factors: the size and makeup of the media market; the available budget; and the nature of the HOV project. The pie-chart below presents a breakdown of a generic media budget for an HOV project. Please consider it as just a template for how a budget could prioritize the media mix of a project.

Experience in Other Projects. A brief summary of media mixes in some other projects should prove helpful to HOV project planners. A major rideshare advertising campaign in Los Angeles in 1993 involved more than \$4 million of advertising, with television, radio and outdoor advertising emphasized. In that campaign, 96% of adults aged 25-54 were exposed to an average of 167 messages each. A much more modestly budgeted project, the Minnesota I-394 campaign spent its annual marketing budget of roughly \$400,000 to produce a radio spot, a billboard, newspaper ads, bus-side advertising, a newsletter, commuter guides and a campaign poster. The Seattle I-5 campaign developed almost an exactly similar media mix, with a further emphasis on premiums and live PSA scripts for radio and television stations. Virginia's first-phase Route 44 project budgeted \$40,000 for a brochure, a two-page newspaper ad and an instructional video. The Second Phase mix added roadside signs, promotional tie-ins, sponsorships of radio traffic reports, and extensive public outreach media activities. The comprehensive media plan for the Long Island Expressway project was divided into three levels of marketing and informational activities, with the top level of budgeting including paid radio and television ads and the printing of newspaper supplements to be included in the papers of corridor residents.

C. CAMPAIGN OBJECTIVES AND STRATEGIES

7. SELECTING MEDIA CHANNELS

EXHIBIT: ADVANTAGES AND DISADVANTAGES OF POTENTIAL HOV MEDIA CHANNELS

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MEDIA CHANNEL	DISADVANTAGES	ADVANTAGES
PUBLIC SERVICE RADIO	Infrequency of Broadcasts Scheduling of Airtime Limited Number of Outlets Run	Free Air Time Can Be Live Reads Production Economies
PAID RADIO	Placement Expense	Highly Targeted Traffic/News Sponsorships Production Economies Live Reads/Personalization
TV PSAs	Production Expense Broadcast Times	Free Air Time
PAID TV	Placement Expense Station Break Positioning	Highly Targeted Association with Programming Audience Viewership
DIRECT MAIL	"Junk Mail" Syndrome	Distribution Economies Highly Targeted
PAID BILLBOARDS	Production Expense Rental Expense	Specific Placement Illumination/Etc. Controlled Scheduling
DONATED BILLBOARDS	Production Expense Posting Expense Location and Schedule Uncertainty	Free Rental Space Widespread Exposure
NEWSPAPER ADS	Placement Expense Positioning within Newspaper Proliferation of Ads	Placement Positioning Credibility Commuter Readership
TRANSIT ADS	Placement Expense Surface Street Routes Interior Ads Preach to the Choir	Hits Them Where They Drive Emphasizes Public Transit Exterior Ads Wide Exposure
BROCHURES	Design & Printing Expense	Highly Informative Multiplicity of Information
POSTERS	Production Expense	Long Shelf Life Reinforces Campaign ID
NEWSLETTERS	Necessity of Repeated Mailings	Accepted Format Good for Direct Mail Breadth/Credibility
OUTREACH VIDEO	Cost of Development/Production Perception of "Expensive" Media	Multiple Public Uses Project Credibility Public Familiarity w/Format
ROADSIDE SIGNAGE	Expense/Installation & Reflectivity	Controlled Placement Appropriate Location
PREMIUMS	Wastage If Not Used	Good ID Reinforcement Distribution Channels

2	PLANNING		C. CAMPAIGN OBJECTIVES AND STRATEGIES	
			8. SCHEDULING	
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	14		15	HOV marketing activities should begin as early as possible in the project planning stages, peak at the time the project opens, and continue over the life of the project.

Marketing activities surrounding HOV facilities can be divided into three separate phases, covering (1) Project planning; (2) Project opening; and (3) Ongoing project operations.

The accompanying exhibit summarizes the key marketing objectives formulated by the team responsible for publicizing the I-394 Express Lane in Minneapolis, along with the campaign strategies and tactics used to achieve these objectives.

Project Planning. The HOV marketing process should begin as early as possible in the project planning stages with constituency building activities and a review of the project's selling points and shortcomings from a public relations standpoint. Too often in the past, marketing personnel have been excluded from the inner circle of project planners until the facility is nearing completion and it's time to try to fill the lanes with ridesharers. As a result, many opportunities for public participation in the planning process are lost, and these lost opportunities can turn into marketing problems when the project is implemented. Potential marketing problems can often be identified and headed off by including marketing personnel on planning and design teams.

After polling a number of engineers, planners, marketers, and administrators to find out what they thought about a variety of HOV marketing issues, Stamm (1991) concluded that

"It appears that those who spend time trying to persuade commuters to leave their single occupant vehicles behind for life in the HOV lane (or sane lane, or diamond lane, or whatever the facility may be) need to consider yet another market--the engineers, planners and administrators who have ultimate oversight authority of HOV projects. So that they, too, will be invited to join the 'inner-circle,' HOV marketing professionals need to heighten the awareness and understanding of the value of marketing as part of the HOV planning process."

Project Opening. The concentration of marketing activities around the opening of an HOV project represents the best understood and usually the best executed portion of the HOV marketing process. This phase calls for the careful orchestration of materials and events designed to announce the opening, advertise the benefits of ridesharing, and entice commuters to try carpooling or transit riding. The marshalling of marketing activities about an identifiable event, the project opening, most closely resembles traditional advertising promotions and can include such familiar activities as calendar count-downs, media blitzes, ribbon-cuttings, press tours and public speeches. A detailed treatment of the marketing activities surrounding the opening of HOV lanes can be found in the Seattle I-5 Case Study of Appendix A.

Ongoing Maintenance. HOV marketing should not stop once a facility has opened. Marketing should be an ongoing part of project operations, tracking the advantages of lane use, advertising support services such as park-and-ride lots or ridematching programs, answering public criticism, and creating realistic expectations for the role of HOV facilities in the modern transportation network.

The accompanying exhibit provides an example of the types of strategies which can be employed to achieve the marketing objectives identified at each stage of an HOV project. The third column lists a variety of tactics reflecting these strategies. Typically, these tactics consist of marketing materials (project logos, newsletters, print ads, radio ads, press kits, etc.) aimed at a particular segment of the target audience. The following section discusses these materials in more detail.

C.CAMPAIGN OBJECTIVES AND STRATEGIES			PLANNING								
8.SCHEDULING											
EXHIBIT:SAMPLE PHASING OF MARKETING ACTIVITIES MINNEAPOLIS I-394											
			<div>2</div> <table><tr><td>SUN</td><td>MON</td></tr><tr><td></td><td></td></tr><tr><td>7</td><td>8</td></tr><tr><td>14</td><td>15</td></tr></table>	SUN	MON			7	8	14	15
SUN	MON										
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PLANNING PHASE											
OBJECTIVES	STRATEGIES	TACTICS									
Introduce project and long-term benefits Create awareness of Express Lane signage Address construction problems Introduce I-394 response center as information clearinghouse	Two-month mass media blitz Paid and non-paid advertising Target special interest groups (law enforcement, legislators, corridor businesses) Set up telephone response center Develop database	Send brochure with map to corridor households Quarterly newsletters Full-page newspaper ads Corridor billboards Radio spots during drive time Information meetings for special interest groups and media Create logo for I-394 connection									
GRAND OPENING PHASE											
OBJECTIVES	STRATEGIES	TACTICS									
Announce opening Advertise benefits Track time savings Create awareness of downtown garages	Two-month mass media blitz Paid and non-paid advertising Target corporate support Develop project identity Develop Express Lane jingle	Heavy newspaper and radio advertising One-time direct mail piece to downtown employers Advance media tour Grand opening ceremony Provide hourly Express Lane status reports on traffic advisory radio shows Schedule weekly, planned news stories Use newsletter to disseminate garage information Produce press kits									
ONGOING MAINTENANCE PHASE											
OBJECTIVES	STRATEGIES	TACTICS									
Increase lane usage by 5-10% per year Create awareness of park-and-ride lots Fill available downtown garage space Educate public in HOV system use Create realistic expectations	Update lane performance data Target corridor commuters, residences, and businesses Use print and broadcast media to position lanes as an integrated transportation system Design special slide show Update database Hold HOV marketing workshop	Regular traffic advisories Continue quarterly newsletters Radio campaign featuring Express Lane jingle Use suburban newspapers to reach likely corridor users Update press kits									

PLANNING		D.MARKETING MATERIALS	
2		1.OVERVIEW	
		A wide variety of print and electronics marketing materials can be employed in HOV campaigns. Whenever possible, all materials should be unified through a memorable logo, slogan, or symbol.	

This section addresses the variety of materials which can be employed in HOV marketing campaigns.

Range and Content. The accompanying exhibit displays the range of potential HOV marketing materials, along with an indication of the content which can be conveyed most easily through the materials and the likely target audience. Printed materials include brochures, newsletters, flyers, newspaper and magazine ads, and posters. Electronic media channels include radio and television spots, while outdoor advertising formats include roadside signs and billboards. A wide variety of premiums such as key fobs, bumperstrips, post-it notes, balloons, matchbooks, coffee mugs, and jam jars have also been used to encourage the use of HOV lanes. Subsequent subsections consider each of these materials in detail, using examples from existing or past campaigns whenever possible.

Thematic and Graphic Consistency. Most effective corporate advertising campaigns use, at a minimum, two primary unifying elements: (1) a slogan, and (2) the company's graphic logo. Both of these elements are customarily used in combination on *all* media products. This policy is not simply a current fad, it is a tried and true approach to building and maintaining a strong public image. The IBM logo, the shell of Shell Oil, "Fly the Friendly Skies," "This Bud's for You"--most people will instantly recognize these logos or statements and form an immediate association in their minds. In developing campaign materials, HOV marketers should strive to create the same consistency of program identity and graphics.

The key to achieving consistency in developing marketing materials is to translate program goals into an easily recognizable *theme* (both verbal and graphic) which will serve as a cornerstone for the media efforts. First, the project should be given a "public" title. This title should be brief and accurate. Research has shown that few drivers refer to carpool lanes as HOV lanes. Many members of the public do not even recognize the acronym. The public is much more likely to understand and identify with more descriptive titles such as the Sane Lane (the early title for Minneapolis I-394), Express Lanes (Minneapolis, San Diego and others), Diamond Lanes (Santa Monica and others), or Transitways (Houston).

Once a suitable title has been found for the project, a professional designer should create a logo (title with accompanying image) or logo type (title in a unique style or rendering). This logo should be used to unify all campaign materials: letterheads, press releases, print and billboard art, television PSAs, etc. The logo should be designed to be appropriate for one- and two-color renditions, and, in some cases, full-color applications. Not every HOV project needs a title, symbol, or slogan, but they can be extremely helpful in conveying key themes to the public. For example, marketing materials on the I-394 project were unified through the use of a single logo showing a construction worker replacing the old Highway 12 sign with a new I-394 standard (shown at the right).

D.MARKETING MATERIALS		PLANNING									
1.OVERVIEW		<table><tr><th>SUN</th><th>MON</th></tr><tr><td></td><td>1</td></tr><tr><td>7</td><td>8</td></tr><tr><td>14</td><td>15</td></tr></table>		SUN	MON		1	7	8	14	15
SUN	MON										
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EXHIBIT:CONTENT AND TARGET AUDIENCE FOR COMMON HOV MARKETING MATERIALS		<div>2</div>									
MARKETING MATERIALS	TYPICAL CONTENT	TYPICAL TARGET									
BROCHURES	HOV Rules Project Map Common Qs and As Ridesharing Advantages Park-and-Ride Lot Locations	Targeted corridor/residents area Area businesses Community groups Media Representatives									
NEWSLETTERS	Project Map Survey Findings Common Qs and As Construction Information Legislative Information Performance Data Ridesharing Advantages Park-and-Ride Lot Locations	Corridor residents Corridor businesses Corridor drivers Community groups Media representatives									
FLYERS	Project Map Construction Information Ridesharing Advantages Project Schedule Opening Ceremonies Park-and-Ride Lot Locations	Targeted corridor residents Corridor businesses Community groups Transit riders Corridor drivers									
PRINT ADS	Ridesharing Advantages Slogans Key Phone Numbers Project Schedule	Targeted area residents									
POSTERS	Slogans Key Phone Numbers	Downtown businesses Park-and-ride lots									
RADIO SPOTS	Ridesharing Advantages Project Schedule	Auto drivers and passengers Targeted area residents									
TELEVISION SPOTS	Ridesharing Advantages Project Schedule	Targeted area residents									
ROADSIDE SIGNS	Start-Up Date Occupancy Requirements Short Jingles Key Phone Numbers	Corridor users									
BILLBOARDS	Start-Up Date Occupancy Requirements Key Phone Numbers	Corridor users									
PREMIUMS – Bumperstrips – Post-It Notes – Mugs – Jam Jars	Slogans Key Phone Numbers Project Logo	Targeted employees									

PLANNING		D.MARKETING MATERIALS	
		2.BROCHURES	
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		Attractive brochures are effective vehicles for explaining project background, showing lane alignment, answering frequently asked questions, clarifying lane utilization requirements, and providing ridesharing and transit information.	

Brochures describing the project and its use are a staple marketing tool that can be used to communicate with all segments of the public, as well as representatives of the political, judicial and business communities.

Format. The most popular format for HOV marketing brochures is the gate-fold or accordion-fold brochure which folds down into 3-1/2" by 8-1/2" panels. Brochures most often contain six or eight panels, but can be larger. Minnesota DOT produced a 24-panel fold-down *Commuters Guide* to the I-394 Express Lanes, while the Washington State DOT produced a 22-page booklet of answers to common HOV questions (see Exhibit). While the number of panels is flexible, the fold-down size fits both a number ten mailing envelope and common literature holders, so the brochures can easily be mailed out in response to requests for information and included in information racks at DMV offices, AAA offices, transit information stalls, rideshare centers, employer bulletin boards, and similar distribution points.

Content. Project brochures should contain general information, attractively presented that is designed for a long shelf life. Contents of existing brochures include

- Project maps
- HOV rules
- Arguments for ridesharing
- Transit information
- Background information
- Park-and-Ride Lot locations
- Common questions and answers
- Ridematching applications
- Information numbers

To ensure a long shelf life, time-dated material such as construction information, project schedule and transit timetables should generally not be included in the project brochure. This information is better handled in newsletters and ad-hoc flyers.

Distribution. As the primary campaign information piece, the marketing brochure should be designed for mass production and distribution. It will have literally hundreds of uses and can be handed out at public meetings, included in press kits, mailed to members of the target audience, forwarded in response to information requests, inserted in information display racks, and provided to legislators, business leaders, and members of the judiciary.

D.MARKETING MATERIALS	PLANNING									
2.BROCHURES	<table><tr><td>SUN</td><td>MON</td></tr><tr><td></td><td>1</td></tr><tr><td>7</td><td>8</td></tr><tr><td>14</td><td>15</td></tr></table>		SUN	MON		1	7	8	14	15
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EXHIBIT:SAMPLE PAGES FROM HOV SYSTEM BROCHURE PREPARED BY THE WASHINGTON STATE DOT										

<div>2</div> <div>PLANNING</div>	D.MARKETING MATERIALS 3.NEWSLETTERS	
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Regular newsletters can be used to keep the public informed regarding route alignments, construction schedules, legislative changes, survey results, transit timetables, ongoing system performance, and other matters of interest.		15

A project newsletter is an effective marketing tool for communicating timely information on a variety of issues. As a regular (or even irregular) publication, it has more flexibility than a brochure, and can be used to update the public regarding changes in project schedules, pertinent legislation, and system performance.

Content. A project newsletter provides a forum for addressing a number of issues in a timely fashion. It can educate readers regarding the planning process, inform them of changes in construction schedules, announce the opening of park-and-ride lots and other support facilities, publish transit timetables, and report the findings of surveys and traffic counts. Newsletters also provide a mechanism for publicly recognizing project participation by constituency groups and allied agencies. Finally, newsletters can be used to correct misapprehensions and ensure that accurate public expectations are maintained regarding project scope and performance.

Frequency. A number of State Departments of Transportation have produced HOV project newsletters. These include Washington, Tennessee, and Minnesota (see Exhibit). Other State DOTs (i.e., CALTRANS) regularly produce newsletters which include HOV news. Regularly scheduled newsletters tend to be produced on a quarterly basis. Alternatively, newsletters can be timed to coincide with project milestones.

Distribution. The project newsletter should receive wide distribution to corridor residents, key employers, community groups, media representatives, transit riders, and affected drivers. In short, nearly everyone on the database mailing list. Regarding distribution, Stamm (1991) suggests that

"Project teams should look to partnering organizations for assistance in newsletter distribution. Transit agencies and local jurisdictions are a good starting point. They can put newsletters aboard their buses, distribute them to their employees, and place them in customer waiting areas. Elected officials may want to insert newsletters in publications they send to their constituents."

D.MARKETING MATERIALS	PLANNING									
3.NEWSLETTERS	<table><tr><td>SUN</td><td>MON</td></tr><tr><td></td><td>1</td></tr><tr><td>7</td><td>8</td></tr><tr><td>14</td><td>15</td></tr></table>		SUN	MON		1	7	8	14	15
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EXHIBIT:SAMPLE PAGE FROM THE NEWSLETTER "I-394 EXPRESSIONS"	2									

<div>2</div> <div>PLANNING</div>	D.MARKETING MATERIALS 4.FLYERS	
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Single-sheet flyers can be used to define project limits, provide construction updates, circulate general ridesharing information, and announce opening day celebrations and other special events.

Content. Single-sheet flyers are easy to design and reproduce, and can be used to supply the public with timely, up-to-the-minute information on construction progress, special events, temporary lane closings, and public meetings. They also provide a handy format for fact sheets covering a variety of topics such as HOV background, ridesharing benefits, fines for lane violations, and legislative requirements.

Distribution. Flyers can be backed with mailing information or mailed in one-sheet "shells" imprinted with the project logo, information number, and return address. They can also be handed out at park-and-ride lots, transit stations, ridesharing events, metered on-ramps, public meetings, office centers, and displayed in information racks at a variety of locations. They are typically aimed at specific segments of the commuting population.

D.MARKETING MATERIALS 4.FLYERS	PLANNING								
EXHIBIT:SAMPLE FLYER	<table border="1"><tr><td>SUN</td><td>MON</td></tr><tr><td></td><td>1</td></tr><tr><td>7</td><td>8</td></tr><tr><td>14</td><td>15</td></tr></table>	SUN	MON		1	7	8	14	15
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<div>2</div>	PLANNING		D.MARKETING MATERIALS	
			5.POSTERS AND PRINT ADS	
	SUN	MON	Posters can help keep the project image before the public and serve as a continuing reminder of the opportunity for ridesharing.	
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Posters provide good visibility for public information campaigns. Once they have gone up, they continue to deliver lasting impressions to target audiences over time.

Content. To be effective, posters and print ads must be graphically appealing and draw in the audience for the marketing message. A good poster or ad should provide a "quick take" of the primary campaign message--attracting the desired audience, convincing them to read the message, providing them with a well-defined action item, motivating them to take the desired action, and leaving them with a positive feeling about what they've seen. Sentiment or humor can help to attract an audience, but sentiment or humor alone won't make a successful poster.

Posters and print ads can carry a number of HOV marketing messages effectively. Through a quick visual take they can convey ridesharing advantages, slogans, key phone numbers, and project identification. All posters and print ads should carry the project logo linking them with other campaign materials.

Posters should be approximately 18" x 24" in size--large enough to attract attention and do the job, but not so large as to discourage posting in locations where wall space or display room is in demand. It is often desirable to produce posters in two different sizes with a smaller size for bulletin boards and other space-limited locations. Even where space is not limited, posters must be sufficiently attractive to appeal to those responsible for posting them.

Distribution. Posters and print ads can be targeted at specific area residents or aimed at a more general audience. Typical locations for posters might include downtown businesses, transit stations, park-and-ride lots, shopping malls, high school driver's ed classes, parking garages, and such public locales as DMV offices and community centers.

D.MARKETING MATERIALS	PLANNING									
5.POSTERS AND PRINT ADS	<table><tr><td>SUN</td><td>MON</td></tr><tr><td></td><td>1</td></tr><tr><td>7</td><td>8</td></tr><tr><td>14</td><td>15</td></tr></table>		SUN	MON		1	7	8	14	15
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EXHIBIT:PRINT ART FROM ORANGE COUNTY HOV AD										

PLANNING		D. MARKETING MATERIALS	
		6. NEWSPAPER ADVERTISEMENTS	
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		While project personnel should attempt to create newsworthy events which will generate newspaper coverage, the purchasing of paid newspaper advertising does not usually represent an effective use of funds in a public information campaign.	

In general, paid newspaper advertising should play a relatively minor role in the media mix of an HOV marketing campaign. This is not to say that newspaper advertising cannot be used effectively in the right circumstances. Compared to other media channels available for promoting public service campaigns, however, newspaper advertising does not rank very high as an attention-getter or an effective use of resources.

Most newspapers do not provide display space free for public service campaigns and feel that they best serve the public interest by *covering* projects and events of public interest. They can devote more space and garner more attention in an editorial context than they might by donating advertising space. One strategy for involving newspapers in a public information campaign, then, is to generate newsworthy activities which will attract newspaper coverage. This is a far more effective, and more convincing, strategy than purchasing advertising space. Most newspapers will also gladly include notices of a public outreach campaign's events or activities in the community billboard or weekly schedule sections.

One of the negative aspects of paid newspaper advertising is the "fall-off" from full readership to readership of a particular advertisement. It may be that 200,000 people, for example, read a newspaper, of which 120,000 may look at a particular section and 80,000 at a particular page. Half of the 80,000 might spot an HOV marketing advertisement and 10,000 might peruse it. This may be a harsh example, but it is nevertheless true that placement costs are relatively high for an audience which is difficult to target effectively and is significantly lower than the total newspaper's readership.

From the standpoint of these guidelines, newspaper advertising just doesn't seem to offer the right vehicle for a public service campaign, particularly a narrowly targeted HOV marketing campaign. Newspaper advertising is extremely useful for retail purposes--advertising sales and products and services. But a large proportion of the population does not read newspapers, and it is a tall task to motivate those that do with the types of messages that would be created for a public education campaign.

There are a few specific instances in which newspaper advertising might offer a good use of funds for an HOV marketing campaign. An exception to the general rule could be made when the primary purpose of the campaign is to inform the general population of a single message--such as the availability of a common 800 number for rideshare matching, or the location of public meetings. These simple and straightforward messages can be effectively conveyed in a newspaper advertising program. Newspaper advertising can also be a cost-effective addition to an HOV marketing campaign if the public agency can find a private partner who is willing to assume the lion's share of the advertising expense in return for the name recognition afforded the partner's products or services. The accompanying exhibit provides an example of an HOV message embedded in an automobile advertisement placed in Houston newspapers.

D. MARKETING MATERIALS 6. NEWSPAPER ADVERTISEMENTS	PLANNING								
EXHIBIT: SAMPLE NEWSPAPER AD	<table border="1"><tr><td>SUN</td><td>MON</td></tr><tr><td></td><td>1</td></tr><tr><td>7</td><td>8</td></tr><tr><td>14</td><td>15</td></tr></table>	SUN	MON		1	7	8	14	15
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<div>2</div>	PLANNING		D. MARKETING MATERIALS	
			7. RADIO SPOTS	
	SUN	MON	Promotional material read by traffic reporters as part of their regular programs not only reaches drivers during their commute time, but also improves the reporters' perspective regarding preferential lanes.	
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Advantages of Radio. Radio offers several advantages as a communications medium for an HOV marketing campaign. It is relatively inexpensive, is easily targeted, versatile, personal, and reaches a captive audience of drivers at a time when they are experiencing the congestion HOV lanes are designed to relieve.

Direct production costs for a radio service campaign are relatively inexpensive. They can range anywhere from a few hundred to a few thousand dollars, depending on the sophistication of the concept, announcing fees, and the use of paid talent. The cost range is one-tenth to one-twentieth the cost of producing a television message of comparable length.

Demographic profiles for radio station audiences tend to be more heavily segmented and better defined than those for television stations. As a result, specific market segments are more easily targeted through radio messages.

Radio is versatile. One doesn't need to be a fan of old-time radio to appreciate the ability of the spoken word and sound effects to produce strong imagery and provoke the listener's imagination. The radio format allows a tremendous amount of latitude in the creative process, since radio broadcasts can evoke images which would be far too expensive to produce on television. As an example, a sound effect of screeching brakes and an automobile accident (cost \$50) can create the same understanding in the radio listener that would require tens of thousands of dollars to create in video.

Radio broadcasts lend themselves to personalized messages more effectively than other types of media. If you're driving in your car and hear a radio message introduced by an on-air personality, it *seems* to be more personally directed at you than a similar message appearing on television or in the newspapers.

A good portion of the radio audience is a *captive* audience. Particularly during commute times, your message may well have the undivided attention of the listener. There is no better time to advertise the benefits of HOV lanes than the commute period, when solo drivers are stuck in traffic.

Live Reads by Traffic Reporters. HOV marketers report that one of the most effective means of reaching the audience of drive-alone commuters is through live on-the-air "reads" by traffic reporters. These messages not only reach drivers during their commute (and sound like reporting rather than the public service messages) but also improve the reporters' views of HOV lanes. Marketers in Minneapolis, Seattle, and Hampton Roads all realized great success with this approach.

Public Service Announcements. More traditional public service announcements (PSAs) can also represent an effective means of radio communication. Creative radio advertising can be produced for relatively small budgets. Peer-group testimonials, pop music beds, production music beds, clever dialogue, celebrity narrators, announcer narratives, and a host of other styles and techniques can be most effective. In Minneapolis, the "Sane Lane" jingle used to introduce the HOV lanes on I-394 was so effective that local residents continued to refer to the Sane Lane long after marketing efforts had been launched to change the identity of the project to Express Lane.

D.MARKETING MATERIALS 7.RADIO SPOTS	PLANNING <table border="1"> <tr> <td>SUN</td> <td>MON</td> </tr> <tr> <td></td> <td>1</td> </tr> <tr> <td>7</td> <td>8</td> </tr> <tr> <td>14</td> <td>15</td> </tr> </table> <div style="font-size: 48pt; font-weight: bold; position: absolute; left: 0; top: 50%; transform: translateY(-50%);">2</div>	SUN	MON		1	7	8	14	15
SUN		MON							
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EXHIBIT:TRAFFIC REPORTERS PROVIDE AN EXCELLENT CHANNEL FOR RADIO SPOTS									

It is generally productive to supply radio stations with different lengths of spots--usually a 60-second, 30-second, 20-second and 10-second treatment of each PSA. Radio station policy regarding acceptance of lengths of pre-recorded spots varies greatly from station to station and from market to market. So it's best to give station personnel a choice on the same reel or cassette. Given a choice, 60-second spots are preferred, simply because the length provides more time to be creative, establish the premise of the ad, and steal more attention from the audience.

Radio outlets are not obligated to broadcast *any* public service messages at this time. On the other hand, most do, and most like to demonstrate a spirit of community involvement, especially around the time their own broadcast license is up for renewal. And many stations are sincerely dedicated to stressing public service promotions. These responsible stations can be effectively reached with a good package of ads and accompanying material. Half the battle in procuring public service air time is in convincing the public service directors to run your ads. There is tremendous turnover among public service directors, and many are beleaguered staffers who pore over the stacks of messages on their desk in the back of the building. In order to appeal to these people and get your spots into the rotation, the ads must be striking and appealing--deemed appropriate to the station's audience--and be judged as providing a legitimate local public service. Minneapolis and Seattle are among the municipalities which have produced creative radio PSAs as part of an HOV marketing campaign.

PLANNING		D.MARKETING MATERIALS	
		8.TELEVISION SPOTS	
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		HOV marketing budgets typically cannot support the production and placement of paid TV advertising, but effective use can be made of local TV news shows, talk shows, and outreach videos.	

In any public information campaign, careful consideration should be given to the role of television in the media mix. In major U.S. media markets, the average time a person spends watching television greatly exceeds the time spent listening to the radio, reading newspapers, or being exposed to other media channels, and research suggests that television is the media channel best remembered as a source of public service messages. Moreover, the television industry has historically been more supportive of public service advertising than other media channels.

While television is an economical means of reaching large audiences (most paid advertising if effectively researched and scheduled, can be placed for between \$5 and \$25 per viewing households), production costs can be daunting for a small marketing budget, and it is difficult to target a specific audience with public service TV ads. Even so, there are a variety of ways television can be useful in an HOV marketing program. In addition to public service spots, effective use can be made of TV news shows, talk shows, video news releases, and educational videos.

Public Service Announcements. The cost of producing a 30-second television spot can range from a few thousand dollars to over three hundred thousand dollars. While a television spot does not necessarily have to be expensive to be effective, many of the elements required to make a television spot *effective* often require considerable expense. Most nationally distributed commercial advertising spots currently cost between \$150,000 and \$300,000 to produce, and public service announcements must compete with these commercial spots for the viewer's attention. Many sophisticated public service announcements have been produced for a cost between \$15,000 and \$50,000. Since the cost of producing a 30-second TV spot can consume a significant portion of a local HOV lane marketing budget, it may be more effective to join with a statewide ridesharing agency to produce a spot that can receive broad distribution.

News Shows. One strategy for involving local TV stations in an HOV marketing campaign is to generate newsworthy activities which will attract the attention of local TV news shows. HOV lane openings are newsworthy events, and should receive wide coverage.

Talk Shows. Local talk shows and community affairs programs offer another opportunity to use TV to promote HOV lanes. To schedule talk show appearances, HOV marketing personnel should phone the show's producers directly and provide a clear idea of the proposed subject matter, speakers, and campaign aims.

Outreach Videos. As an alternative to (or in addition to) a 30-second public service announcement, a longer, five-to-ten-minute video presentation documenting the reasons for HOV lanes, the benefits of ridesharing, and the penalties for using the lanes illegally can serve a variety of functions. Such a video can serve as the core of outreach presentations to community groups; be used as a mail-out piece to institutions and organizations; and provide program material for newscasts and talk shows on VHF, UHF, and Cable TV stations. Outreach videos can be produced at relatively low cost using the "news magazine" format currently popular on TV. The accompanying exhibit contains some sample titles of public information videos on HOV topics produced by a variety of jurisdictions, along with the names of contacts able to provide information on each video's availability.

D.MARKETING MATERIALS		PLANNING								
8.TELEVISION SPOTS										
EXHIBIT:PUBLIC INFORMATION VIDEOS ON SELECTED HOV FACILITIES		<div>2</div> <table><tr><th>SUN</th><th>MON</th></tr><tr><td></td><td></td></tr><tr><td>7</td><td>8</td></tr><tr><td>14</td><td>15</td></tr></table>	SUN	MON			7	8	14	15
SUN	MON									
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TITLE	RUNNING TIME (MINIMUM)	CONTACT								
"Making Carpool Lanes Work For You" (Five Versions: Statewide and Los Angeles, San Francisco, Sacramento, and San Diego Regions)	10:00	Mike Auslan, Public Information CALTRANS, (916) 654-2697								
"Ramp Metering" (Five Versions)	10:00	Mike Auslan, Public Information CALTRANS, (916) 654-2697								
"Traffic Management Plans" (Statewide)	10:00	Mike Auslan, Public Information CALTRANS, (916) 654-2697								
"Tacoma Ramp Metering"	12:30	Heidi Stamm, Pacific Rim Resources WADOT, (206) 526-0559								
"HOV Facilities: The High Occupancy Alternative"	19:04	Heidi Stamm, Pacific Rim Resources TRB HOV Systems Committee (916) 526-0559								
"Hampton Roads HOV System"	12:51	Bill Cannell, Suffolk District VADOT, (804) 925-2584								
"Transportation: Making Choices, Making a Difference"	8:00	Stacey Pruett, North Virginia District VADOT, (703) 934-7309								
"Ground Control"	6:00	Roger Polson, Public Information TXDOT, (512) 463-8585								
"I-394 Moving Into the Future"	11:30	Judy Rockvam, Library MNDOT, (612) 341-7505								
"Vanpooling On Route"	30:00-60:00	Enza Pattison, Public Affairs BC Ministry of Transitways, (604) 387-7787								
"High Occupancy Alternative"	19:00	Enza Pattison, Public Affairs BC Ministry of Transitways, (604) 387-7787								
"Enjoy the Alternatives"	5:59	Lucy Unsworth, Project Director FLDOT, (305) 938-9222								
"The Ottawa-Carleton Busways"	6:00	Ian Boyd, Transit Division Regional Municipality of Ottawa-Carleton (613) 560-6001, Ext. 1717								
"Hot to Ride the Bus"	10:00	Andrea Hahn, Public Information AZDOT, (602) 534-1804								
"I-270 Maryland"		Heidi Van Luven, MDDOT (410) 333-1117								

<div>2</div>	PLANNING		D. MARKETING MATERIALS	
			9. OUTDOOR ADVERTISING	
	SUN	MON	Billboards, transit advertising, and roadside signs afford the campaign the opportunity of reaching drivers while they are actually traveling in HOV corridors.	
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Billboards. Billboards can be an effective channel for reaching targeted populations with public education messages dealing with construction, carpooling, and the coming of HOV lanes. There is little better way to reach drivers directly with timely messages than when they are actually on the road driving--billboard messages target the users of the routes in question and hit them "where they live." Several jurisdictions, notably Minneapolis and Seattle, have used billboards effectively to advise corridor drivers of the coming of HOV lanes.

Many billboard companies routinely offer a certain portion of their rentals to public agencies. You may find in your region that there is a billboard "pool" manager who deals with requests for donated billboard space. He or she may act as a broker with all of the local billboard companies to arrange for a posting of public service messages. Depending on the season or the local economy, there may be unrented billboard space which can be offered for public service campaigns.

Budget permitting, a certain amount of paid billboard placement might be able to leverage additional donated postings over those available in the absence of any purchased billboard space.

Transit Advertising. Bus-side advertising is another form of outdoor advertising which can be used effectively in HOV marketing efforts. HOV marketers in Seattle purchased advertising space on the sides of buses used on the I-5 corridor to reinforce the message sent to cars stuck in the mixed flow lanes as buses sped by them.

Roadside Advertising. The Virginia Department of Transportation (VDOT) used a series of roadside signs carrying punchy poetry similar to the old Burma Shave jingles to advertise the coming of HOV lanes in Hampton Roads and on the Dulles Toll Road. Two examples of jingles used in Hampton Roads appear below.

A similar approach had been suggested for the changeable message signs on the Santa Monica Freeway (see Exhibit). While the Burma Shave jingles were widely praised in Hampton Roads, a similar approach was criticized on the Dulles Toll Road.

<div>D. MARKETING MATERIALS</div> <div>9. OUTDOOR ADVERTISING</div>	<div>PLANNING</div> <div><div>2</div><table><tr><td>SUN</td><td>MON</td></tr><tr><td></td><td>1</td></tr><tr><td>7</td><td>8</td></tr><tr><td>14</td><td>15</td></tr></table></div>	SUN	MON		1	7	8	14	15
SUN	MON								
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<div>EXHIBIT: DIAMOND LANE JINGLES SUGGESTED BY THE SOCIETY FOR THE PRESERVATION OF BURMA SHAVE SIGNS IN AMERICA</div>									

Erected a year before the HOV lanes were introduced, some of the early Dulles signs were criticized as being too vague. One such series carried the poem:

After HOV restrictions had been rescinded on the Dulles Toll Road, the signs carried a new set of messages, one of which read:

VDOT was criticized in the press for using public funds to construct and manage the signs. The different reception accorded the roadside jingles in the successful Hampton Roads project and the unsuccessful Dulles Access Road project is another manifestation of the observation that it's easy to market a good product, but that no amount of marketing can salvage a flawed concept. In the case of HOV lanes, media attacks can sour the public on every aspect of a flawed project, from the marketing to the management.

<div>2</div>	PLANNING		D. MARKETING MATERIALS	
			10. OFFICIAL SIGNING	
	SUN	MON	Official roadside signs provide marketing opportunities to post information regarding rideshare numbers, minimum fines, and HOV support facilities.	

General Signing Guidelines. General signing and pavement marking requirements and guidelines for HOV facilities are contained in the Federal Highway Administration's Manual on Uniform Traffic Control Devices (MUTCD). Two sections specifically address preferential lanes: Section 2B-20, Preferential Lane Signing; and Section 3B-22, Preferential Lane Markings. Those sections establish requirements for (1) The regulatory nature of required signing; (2) The message format for the signing; and (3) The elongated diamond symbol to be used with both signing and pavement markings. Examples of Side- and Overhead-Mounted HOV signs from the MUTCD appear below.

Information Signing. Signings and markings for actual HOV projects are normally applied on a project-by-project basis following the principles of MUTCD. The use of roadside information signing following MUTCD guidelines provides a unique opportunity to send daily marketing messages to corridor drivers. Examples of informational signs with a marketing content appear below.



CALL 237-POOL

**MINIMUM FINE
FOR
CARPOOL VIOLATIONS
\$260**

**Supp
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Facili
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Signi
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Signin
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H O V
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rt facilities such as transit stations and park-and-ride lots provide additional opportunities for constructing marketing messages along the right-of-way. Trailblazing signs directing drivers to these facilities can be liberally positioned along the right-of-way, so long as they conform to MUTCD guidelines. Some states permit the logo of the local transit agency or transportation department to be included on the signs. Examples of trailblazing signs for support facilities appear below.

PLANNING		D. MARKETING MATERIALS	
		11. PREMIUMS	
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		Premiums incorporating the program logo can help to keep the project's image before the public. Bumperstrips are particularly valuable in this regard, while more personal items such as coffee mugs can serve as reminders for members of the working press.	

The general term "premiums" incorporates the full realm of individual products, pamphlets, trinkets, and doodads that can be distributed to keep the name and/or slogan of a campaign in the public eye. Your home and office is undoubtedly littered with such premiums; calendars from the dry cleaners; digital clocks from *Sports Illustrated*; key fobs from the service station; paper weights from your insurance agents; a political button from a candidate for Sheriff, etc. Each of these premiums can do an effective job of keeping their sponsor's name in front of you on a regular basis. The selective use of premiums can be effective in HOV marketing campaigns, particularly in two areas: (1) for distribution to representatives of the press and community organizations; and (2) for outdoor "advertising" purposes in the form of bumperstrips, car shades, T-shirts, decals, and badges.

Coffee mugs and specially-imprinted desk items are good premiums to distribute to members of the press. They could be included with initial press kits or distributed with personal visits. These premiums have a way of sticking around and reminding the reporter or editor of your marketing message.

For the general public, bumperstrips can be a useful premium for public information campaigns. Bumperstrips provide an additional avenue for outdoor advertising, and research suggests that bumperstrips rank relatively high as a means of conveying traffic safety messages. On the other hand, research (Billheimer and Soloman, 1982) also suggests that small personal premiums such as matchbooks and key fobs are not generally recognized or remembered by the public at large.

Premiums should incorporate the program logo and/or slogan and, if possible, be somehow linked to the HOV marketing effort. Examples of premiums used in past HOV marketing and traffic safety campaigns appear below.

Traffic Jam Jars. Virginia DOT produced small jars of grape "Traffic Jam" as reminders of the congestion problem. These jars were given to business, government, media, and public opinion leaders who attend a half-day transportation conference of "jam sessions" designed to explore ways of solving the region's traffic problems. The invitations for the session echoed the Burma Shave jingles used to advertise the coming of Virginia's HOV lanes (See Section 2-D-9):

We're all in this jam
Like grapes in a bunch
So join us for breakfast
And be gone by lunch.

Post-It Notes. Seattle marketers used post-it notes to advertise the coming of the I-5 HOV lanes. These notes were distributed by janitorial services to desks in downtown office buildings and did double duty, reminding both the sender and receiver of the notes of the HOV message.

D. MARKETING MATERIALS 11. PREMIUMS	PLANNING								
EXHIBIT: LITTERBAG FROM MINNESOTA DOT ADVERTISING THE COMING OF I-394	<table border="1"><tr><td>SUN</td><td>MON</td></tr><tr><td></td><td>1</td></tr><tr><td>7</td><td>8</td></tr><tr><td>14</td><td>15</td></tr></table>	SUN	MON		1	7	8	14	15
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2

Litter Bags. Minnesota DOT developed litter bags advertising the coming of Express Lanes on I-394 (see Exhibit).

Calendars. Minnesota DOT also developed wall calendars which were handed out during the grand opening of I-394. Each month contained a view of the new express lanes and their supporting systems, along with a brief pitch for ridesharing. The expense of the calendar was defrayed by twelve business partners who each placed their logo on a calendar page.

Car Shades. Folding cardboard sunscreens, or "car shades" make useful premiums in hot climates. They have been used successfully in promoting designated driver projects (Billheimer and Moore, 1987) and have a natural linkage with automobiles. Like bumperstrips, they provide a form of outdoor advertising when they appear in cars throughout the project area.